

# A TRADITION OF GIVING

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# **A TRADITION OF GIVING**

## **AN ORAL HISTORY OF THE JOHN BEN SNOW FOUNDATION AND THE JOHN BEN SNOW MEMORIAL TRUST**

An Oral History Conducted by Alicia Barber, Mary A. Larson and Allison Tracy  
Edited by Alicia Barber and Allison Tracy

University of Nevada Oral History Program

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## PREFACE

Established in 1964, the University of Nevada Oral History Program (UNOHP) explores the remembered past through rigorous oral history interviewing, creating a record for present and future researchers. The program's collection of primary source oral histories is an important body of information about events, people, places, and activities that have been significant in the twentieth century history of Nevada and the West.

The UNOHP wishes to make the information in its oral histories accessible to a broad range of patrons. To achieve this goal, its transcripts must speak with an intelligible voice. However, no type font contains symbols for physical gestures and vocal modulations which are integral parts of verbal communication. When human speech is represented in print, stripped of these signals, the result can be a morass of seemingly tangled syntax and incomplete sentences—totally verbatim transcripts sometimes verge on incoherence. Therefore, this transcript has been lightly edited.

While taking great pains not to alter meaning in any way, the editor may have removed false starts, redundancies, and the “uhs,” “ahs,” and other noises with which speech is often liberally sprinkled; compressed some passages which, in unaltered form, misrepresent the chronicler's meaning; and relocated some material to place information in its intended context. Laughter is represented with [laughter] at the end of a sentence in which it occurs, and ellipses are used to indicate that a statement has been interrupted or is incomplete...or that there is a pause for dramatic effect.

As with all of our oral histories, while we can vouch for the authenticity of the interviews in the UNOHP collection, we advise readers to keep in mind that these are remembered pasts, and we do not claim that the recollections are entirely free of error. We can state, however, that the transcripts accurately reflect the oral history recordings on which they were based. Accordingly, each transcript should be approached with the

same prudence that the intelligent reader exercises when consulting government records, newspaper accounts, diaries, and other sources of historical information. All statements made here constitute the remembrance or opinions of the individuals who were interviewed, and not the opinions of the UNOHP.

For more information on the UNOHP or any of its publications, please contact the University of Nevada Oral History Program at Mail Stop 0324, University of Nevada, Reno, NV, 89557-0324 or by calling 775/784-6932.



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## INTRODUCTION

The name John Ben Snow is much known and beloved throughout Northern Nevada. Although born and raised in New York State, Snow has had an enormous impact nationwide through the philanthropic generosity of one of his legacies, the John Ben Snow Memorial Trust.

The Nevada connection began with Rollan Melton, a longtime editor and later publisher of the *Reno Gazette-Journal* who served as president of Speidel newspapers from 1972 to 1977. In that capacity, Melton became well acquainted with John Ben Snow, the co-founder of Speidel newspapers. Melton was present when John Ben Snow first conceived of a Memorial Trust and Foundation, and Melton began to serve on the Board of Directors for both the Trust and the Foundation in the 1970s. After Melton's death in 2002, he was succeeded on the Board by his daughter, Emelie, and his wife, Marilyn, who stepped down in 2010.

John Ben Snow Memorial Trust grants are directed toward the geographical areas that its Trustees call home. As a result of

the Melton family's long relationship with the Memorial Trust, Northern Nevada has been fortunate to receive funding for many activities and organizations in the designated fields of Arts and Culture, Community Development, Education, Environment, Historic Preservation, and Journalism.

Since the 1990s, the John Ben Snow Memorial Trust has been the single greatest benefactor to the University of Nevada Oral History Program (UNOHP). Not only has the Memorial Trust given the UNOHP more financial support than any other foundation, granting agency, or private donor, it has also helped to advance the program in innovative and creative ways that would not have been possible without its support.

In 1991, then-UNOHP director Tom King applied for the program's first grant from the John Ben Snow Memorial Trust, for an oral history project with the Washoe people. King hoped to use video to document certain aspects of Washoe lifeways that could not adequately be described through traditional audio recording alone. Receiving this initial

grant was transformative for the program. In addition to funding the oral history interviews for this project, the John Ben Snow Memorial Trust helped the program to purchase video equipment and set up its own small production unit. The trustees had the foresight to see that this work could open up a whole new arena for the program to document the state's history, and that it could result in a durable, valuable, and accessible record of the Native American experience in Nevada.

As the years went by, the John Ben Snow Memorial Trust supported the UNOHP with additional grants to support the program's video documentary efforts and a range of other work, including the program's innovative book publishing efforts. These two features—video documentaries and book publishing—set the UNOHP apart from all other academic oral history programs in the country. By funding these efforts, John Ben Snow enabled the UNOHP to reach a much larger audience than would otherwise have been possible.

Other University of Nevada projects benefiting from major gifts from the John Ben Snow Memorial Trust include the William N. Pennington Health Sciences Building, the Redfield Campus, Black Rock Press, the Robert Laxalt Distinguished Writer Program Endowment, the Reynolds School of Journalism, the School of Medicine, the School of Nursing, and the Mathewson-IGT Knowledge Center. The Trust has also provided grants to community projects and organizations throughout the region.

In 2009, the UNOHP began to document the history and activities of this important organization by interviewing some of its key figures. Mary A. Larson, Allison Tracy, and I conducted interviews with Ann Scanlon, Allen Malcolm, David Snow, Jonathan Snow,

Valerie MacFie, and Angus Burton while they were in Reno for their 2009 board meeting. Marion Fish, Joe Mitchell, Marilyn Melton and Emelie Williams were interviewed in the months that followed, with all interviews completed by December 2011. The result, compiled here as *A Tradition of Giving*, offers a valuable glimpse into the strong ethic of philanthropy long practiced by the dedicated trustees, board members, and staff of the John Ben Snow Memorial Trust and John Ben Snow Foundation.

Alicia Barber  
Director, UNOHP  
January 2013

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# THE JOHN BEN SNOW FOUNDATION AND THE JOHN BEN SNOW MEMORIAL TRUST

*Courtesy of John Ben Snow Foundation, Inc.  
and John Ben Snow Memorial Trust*

John Ben Snow was born and raised in Pulaski, New York, a small village north of Syracuse. He graduated from New York University in 1904 and soon thereafter entered the Woolworth organization. A man of vision, he was attracted to mass market sales and introduced innovative retailing techniques. He rose rapidly through the ranks of Woolworth from stock boy to corporate director, initially in New York, and finally in Great Britain, where he accumulated a small fortune through hard work, savings and wise investments. After retiring from Woolworth's in 1939, Mr. Snow devoted the remainder of his life to building the Speidel chain of newspapers and publishing the *Western Horseman*. He was fond of animals, especially horses, enjoyed racing, fox hunting, polo and range riding. Throughout his life, John Ben Snow shared his wealth with relatives, friends, business associates and fellow Pulaskians. He gave generously and freely

to those persons and causes he cherished. He preferred to "invest" in people, especially the young, by making available financial assistance. He also believed in improving the quality of life in Pulaski and its environs.

The John Ben Snow Foundation, Inc. was established in 1948 by John Ben Snow and continues to operate under the terms of its original charter. The charter, granted by the State of New York, authorizes the Foundation to grant funds for educational and humanitarian purposes to qualified organizations. The present membership of its Board, seven in number, includes persons of diverse occupational backgrounds and geographical areas. The Board meets once a year, usually in June, to approve new grants and review previously funded projects.

In 1975, two years after his death, The John Ben Snow Memorial Trust was established in New York. The four original trustees were a member of the Snow family, a lawyer, a publishing associate and a corporate trustee, the Irving Trust Company, now The Bank of New York. All were close to the donor

and aware of his beliefs, values and ideals. The individuals named as trustees and their successors were empowered to grant funds for educational, scientific and humanitarian purposes to qualified organizations. They meet once a year, usually in June.

Board of Directors,  
John Ben Snow Foundation

Jonathan L. Snow, President  
David H. Snow, Vice-President and Treasurer  
Valerie A. MacFie, Secretary  
Angus M. Burton  
Marion Hancock Fish  
Emelie M. Williams

Trustees,  
John Ben Snow Memorial Trust

Valerie A. MacFie, *Trustee*  
Jonathan L. Snow, *Trustee*  
Emelie M. Williams, *Trustee*  
Bank of New York Mellon, *Corporate Trustee*

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ANGUS M. BURTON

*Mary Larson: Could you start out telling us a little bit about your family and where you grew up?*

Angus Burton: I'm fifty-one years old. I was born in Cincinnati and then spent about five years in New Jersey. Then I moved to Hudson, Ohio, for about ten or twelve years, and then moved from Hudson, Ohio, to Gibson Island, Maryland, in between my junior and senior years of high school. I actually went back to my high school and was a boarder my senior year. I graduated and took a postgraduate year, as they called it, in between high school and college at a school called Northfield Mount Hermon in Massachusetts. From there I went on to Hobart College for four years, and graduated in 1981.

I met my wife, Dana, who was two years ahead of me at Hobart, and we got married right after I graduated and moved back to Baltimore, where my family was. I have lived in Baltimore ever since. I've been in the investment world for my entire career. I started working with a small company as

a broker in Baltimore, and about three or four years ago left the brokerage business and joined a partner in an investment management firm. We manage money for families. I've been doing that about three-and-a-half or four years and love it.

I have three children. The oldest is twenty-three, and graduated from the University of New Hampshire. The next one is twenty-one, and she's going to be a senior at the University of Vermont. Then my son, who's nineteen, is going to be a freshman at the University of Vermont.

*Strong New England ties there.*

Yes. We spend every summer up in Maine, and I think that really got in the kids' blood.

*What are their names?*

My oldest is Lowell Ann. My next is Margaret; we call her Margie. My son, who's Angus McPhee Burton Jr., we call "Mac," short for McPhee, to avoid confusion.

*Can you talk first about how you became involved initially with the John Ben Snow Foundation?*

Well, my wife's uncle is Allen Malcolm, so I've known Allen for years. He was aware of my investment experience, so when a space came available on the board, he threw my hat in the ring, among many others, to fill that position. Based on his recommendation, the board asked me to come up and interview, and so I did. I think because they were looking for an investment person, that's why I was picked. The relationship with Allen is how I became aware of the Snow Foundation, and I was aware of it through him because he talked a lot about the Foundation. He's very into it and very proud of the work they do, and I thought it was intriguing.

Even though it's a time commitment and essentially volunteer, I was interested in the position because not only do I think it's really worthy, but also it's enlightening to me because several of the families that I manage money for are considering starting their own foundations. In fact, one has already started his own family foundation. So it's really helpful to me to see how an experienced, well-run family foundation should operate, and hopefully it'll be helpful to some of my families that I work with. All in all, it was a nice package. I get to do something that I think is worthy, and I'm learning as I go.

*Who were you replacing on the board when you came on?*

I replaced Bruce Malcolm two years ago. My first meeting was June of 2007.

*I realize it won't be too different, since it's only been in the course of two years, but what was the board like when you joined it?*

The two words that I would use to describe the board then, and now too, are "warm" and "dedicated," and that really is pretty much the way they are. I felt I was part of the board basically right away, which was really nice. They are truly dedicated to its mission. A lot of people can take these things for granted and can, in some cases, abuse the situation. This is a very professional, very focused, very dedicated group, but they still manage to make it fun.

*Coming on board, were you given any materials or background history, or had you just gotten that by osmosis from knowing Allen for so long?*

Actually, they were pretty thorough. Before my interview, I got a whole package that had a history of the Foundation, history of the Trust. I was aware of their website and familiarized myself with that, looking at all their past grants for the last five years. So I really felt like I had an understanding of what their mission was.

*I was just wondering what the process was when they're bringing people in now.*

Yes, how do you close that loop? They were really, really helpful. In fact, there's even a small book, and I read that. So they are very into it.

*Do people pair up and mentor the newer members of the board, or is just a group effort?*

I think it's a group effort, and I think I was perhaps unusually easy because of my relationship with Allen. I see him at family functions and things. Actually, he and I have gotten to be pretty close. It's really nice. I'm really fond of him. I think potentially the way it seems to be working out is that I'm

sort of his protégé, in the sense that he's the investment guy, and I just took over the chair of the Investment Committee for him. In fact, just about twenty minutes ago I was asking him if he felt my chair report was fine, and he told me that he thought it was okay. It's informal, but I'm lucky to have that pairing.

*When you got on the board two years ago, was the membership essentially the same as it is now?*

Yes. David [Snow] was president. I think it's the same as it is now. I think they're about to change, maybe today. So it's David as president; Jonathan [Snow] as vice president and treasurer; and then Emelie [Melton Williams] as the secretary.

*How would you explain the duties of everybody as far as, first, the officers and then the board members and the committees?*

David, as president, I think is on all the committees. My interaction with him is on the Investment Committee, and in that regard, he's just like any other member. He's got a vote and a voice, and he's in all the face-to-face meetings and also on the conference calls. He also is responsible for running this meeting and doing some prep work for this meeting. I'm sure he has other duties behind the scenes that I don't know, but that's what I see.

My sense is also that David comes into play in a big way if there's a problem. If something happens or if there's some scenario that really needs a guiding hand, that he's the first go-to person.

Jonathan is on site. He's at the headquarters, and he and Ann [Scanlon] run everything. As treasurer, he is extremely detail oriented, does phenomenal reports, and he's just on top. Both he and David are really well versed in the

rules and regs of the family foundation and the interaction of this one. So it's really all the details they seem to be able to just deal with; both of them are pretty impressive. Jonathan does all the quarterly reports, prepares the treasurer's report, and it's a lot of work. So that's what I see him doing.

Emelie takes the minutes for this meeting, and I think she's on the Grants and Foundations Committee. She also organized this trip. I don't hear or see her much because she's not on the Investment Committee, so my only interaction with her is here, but I know she's doing all that other stuff behind the scenes.

*What's your role in the Investment Committee and what's the Investment Committee's role in the Foundation?*

Well, my role now is chair of the committee. As chair, first of all, I receive the physical monthly reports from all the managers who are running the various pieces of the Foundation. I also am charged with calling meetings when we need them. So, for example, during this last year, which has been really quite an experience, we—

*You got on just in time.*

Yes. I've been getting teased about how well things were going before I got here and that maybe I should be replaced already. So I hope it's in good nature.

So we had two ad hoc emergency meetings, and that's on top of getting quarterly reports. I call those and guide those and throw my strategic wisdom in there, and then everyone votes on it. That's my role.

The obvious role of the committee is that they're responsible for the money, for the investments. The committee is structured



in a way that we aren't actually doing the micromanaging of the money, so we're not deciding if we should be buying XYZ stock or selling XYZ bond. We have hired managers to run various parts of the portfolio, and they are assigned percentage weightings of the portfolio. So according to their philosophy and firm's orientation, they do that.

Our job is to oversee their individual performance and adherence to their mission, and then also to determine an overall asset allocation strategy. If we think one should have a little more money because of the situation, then we move the money between them, depending on how we're reading the tea leaves, and then they execute their philosophy. It's more of a macro-management job than an asset allocation job and the strategic vision as opposed to the day-to-day running.

*I understand that the management in the four quadrants, essentially, came about in the 1990s. Do you have a sense of what changes were made at that time, if there were any changes in the investment strategy beyond the move?*

I am not 100 percent sure of how it all came to be, but I think that the fund was custodiated at a bank and that the bank was doing some advising in the committee. The committee was maybe more down in that micromanagement level, and I think for a number of reasons, some of which I'm not really aware of, they decided that wasn't a good way to do it, so they pulled it away. That's when they decided to assign these baskets to outside managers and began to manage the managers, as opposed to managing the fund, which I think from a fiduciary standpoint is a really smart thing to do. It also, from an investment result, potentially has been a big game-changer for them. Hard to tell, because you can't see what

they would have done, but I think it was a very, very wise move.

*With the Investment Committee, are you involved at all with management of the Trust funds?*

Just the Foundation. There's the Foundation and then there's the Memorial Trust. The Memorial Trust is separate. I actually sit in on the meetings—which will be tomorrow morning—and throw my thoughts in on the investment side. But I think I'm almost there as a guest. I don't have a vote. It's just more of an advisory capacity. Anyone can sit in, and a lot of us do, because they're so intertwined.

*What sorts of things does the Investment Committee take into consideration when looking at the investments that are being made by the managers?*

We have an investment policy statement that's subject to review from time to time. It contains some guidelines for the committee, but also some guidelines for the various managers. Those guidelines are asset allocation, quality of the bonds, what the investment rating is, the grade, and so on.

I think so far, having been on it for two years, we're looking at the economic environment, the market environment, as one big factor. As I said today, it's an interesting task because we really are serving two masters. We have the short term of making sure that we are providing the funding for all of these grants and for the operation of the Foundation, and so that's a short-term focus.

Then you have the long-term focus of trying to make sure that this Foundation is alive for a hundred years or a thousand years. It's a little bit of a push-pull, short term



and long term. We're trying to achieve that balance, and so that's part of it, too.

In the short term, another important factor is the budget for expenses and for the projected grants, and making sure that we have a thoughtful way to take care of that. You have the 30,000-foot view of what's going on in the world and investments and how it all relates, and then you have the ground floor of how are we going to pay for what we need to pay for. Those are the factors.

As it relates to the managers themselves, we are looking at their long-term, intermediate-term, and short-term performance, and looking for possible signs of divergence from what we're expecting. Also we try to keep an eye out to make sure that they aren't changing on us and morphing into something different, which would throw off our whole plan.

*You mentioned before, balancing the 30,000-foot view with the on-the-ground view. How do you adjust for years like this last one, when you've got that push-pull between the two? What sorts of things do you do to adjust over the next years?*

For the ground floor, something that we did that I think was my first impact was two years ago, in June of '07, we started a different strategy. We looked out one and two years, took a guesstimate of what we might need to use to fund it, and then we pulled that money out of the market and put it into a bond that would mature right around the time we needed the money. I didn't know what was coming, but at the time the thought was that you want to control the sell decision. We didn't want to be caught in a bad market and then have to raise money selling at the bottom. So that was good.

That's what we did for the short term. In hindsight, it would have been great to have put

it all into it. However, we couldn't have done that anyway because of the asset allocation guidelines. In fact, we just talked about what happened, what we could have done, what we did do, and what we could have done differently. We ended up at the end of that conversation changing the asset allocation guidelines and the investment policy because they are not set up for a crisis environment. Most policy statements aren't. They're set up for the long-term stability of the markets over time.

We changed it to give us more latitude. It may be that the horse is out of the barn and it's too late, but if something even similar to this arises, we will have more latitude to be more defensive than we were going into this one. So those are the changes we did, and that's about all you can do. It's up to the managers. We've got a pretty good group of managers. Some I've got a yellow flag on, a caution flag, but the others I feel really great about. I think we've got some really good guys, good people.

*How have the Foundation funds weathered the most recent downturn?*

We got a sheet that Jonathan pulled out of a paper, and it had seventy-two foundations, a mix of private and public, but it looked like a lot of private, which is what we are as a family foundation. Based on what we saw—we don't know what the metrics were—in other words, we have no text to explain the rankings or the numbers, so we don't know what's in it—but just taking our best guess—it looks like we were in the high middle of the pack. So if there were seventy-two, we might have been in the top third, like around thirty or so. So we did better than a lot, worse than many. On a relative basis, we outperformed all of the major indexes, but we still lost a terrible

amount of money. I mean, everyone did. It was very painful.

It affects who we give to, which is the saddest thing. It's one thing if it's your own money. I mean, that's really painful, but it's just as painful to know that there are these people who really count on foundations all across the country. If you took a look at the horrific damage, there's no way that these folks can give out as much money as they have in the past or they risk that long-term dent. They risk harming the long-term viability.

*From reading the Chronicle of Philanthropy, it looks like there are fewer assets out there but more people applying for everything.*

Perfect statement, absolutely.

*So that's been the case here too?*

Absolutely. In fact, the Grant Committee was saying that their grant requests were up. I think it's because some of these family foundations are actually hard to find. Plus, the Foundation is very regional, so I'm betting that most people know who they are already, but they still had a spike in requests.

*You mentioned the idea of taking things out and putting them in bonds a year or two out for the grants that will be made shortly. Are there any other particular approaches that you're considering at this point to try to stabilize the base?*

We are contemplating more transparency in the portfolio, and the best way to achieve that is to move away from mutual funds. At any given time, it's really hard to know what's going on inside of them. On what's called a segregated account management, you have basically a private manager who's running

your fund, and if he buys shares of XYZ, you see the purchase, you see what he owns in the portfolio, and at any given time you can make a request and they can tell you the situation. On a mutual fund, it's really not public information for almost three months after the end of the quarter.

*So it's much harder to make adjustments.*

Which is fine, except that some of the funds do a lot of different things and they have a lot of latitude. If we think that they are primarily our bond manager, and then it turns out that they had a lot in alternative investments and things like that, we may not always pick that up in the rearview mirror. Whether or not that would have changed our approach is hard to say, but it would be nice to know. The transparency issue is something that we're really looking at.

*As far as the grant making actually goes, what kind of emphases do you see in the grants that are being given out by the Foundation?*

In their mission statement, I think they have five or six criteria, and if you're not in those, don't bother. I can't tell you exactly what they are. I can probably come close. What I heard a lot today was that they were very focused on core-value stuff. In other words, here's something that they didn't fund. They did not fund an experiment to convert a van from gasoline to biodiesel. They did not do that because they felt like that they had less money to give and that that was not as important as putting [money in] clothing, food, supporting jobs, housing, and things like that. They basically said, "Okay, in good times we can do a little non-core stuff, but in times like this, let's take care of people who really need the money." I'm pretty sure that

a lot of the commitments this year will be to education, housing, things like that. They do a lot of great inner-city work as well, and the environment, too.

*Do you have a sense this year that there have been a lot more unsolicited proposals versus solicited proposals?*

I don't have a sense. It hasn't been talked about yet. My sense from what I heard at lunch is that there were more unsolicited proposals, but I didn't hear anyone go, "Oh, my gosh, you should see all the proposals. We don't even know where they're coming from."

*How do you envision the management of the Foundation funds evolving in the future? You mentioned the transparency issue.*

This may not happen at all, and it certainly won't happen overnight, but I think where my fingerprints would show up, if it works this way, would be that at some point all of the money will be in the hands of specialists. They are now, but they're commingled in the form of mutual funds. I should say most, not all, but most of the funds would be. So, for example, we already are using one specialist. That's just the way I like it, and that person is handling a very large portion of our domestic equity investment and does a great job. Even his reports are cleaner and clearer in nature. Of course, that's probably because he's highly professional, but also because he's talking to us about our portfolio.

I could envision a guy like him, only whose job is to manage our international portion, equities and bonds, something like that, and maybe someone who's managing the bond portfolio by using individual bonds as opposed to putting this into a fund, which I'm highly prone to. I like the control of that better.

To sum it up, I envision the fund being divided in the segregated management fashion among the same asset classes we are using today. We're not going to change the asset allocation mix dramatically, but just change the way that they're being managed.

*Just briefly, since we haven't talked about this, I'd like to hear your explanation of how they're divided right now into those four.*

I'm not 100 percent tight on exact percentage.

*I'm not going for numbers; I'm just trying to get a sense.*

We have one manager who's responsible for domestic equities, and his fund is divided into thirds into large cap, mid cap, and small cap. He's a fairly large percentage of the total. Then we have another manager, and it's large cap growth, so it's a different management style, but it's intended to complement what this other guy is doing. So those would be our domestic equity managers.

*Those two are which?*

One is Tocqueville. I think the person who's in charge of the other is Northwest.

*Northwestern Mutual?*

Yes, something like that. But, really, they are the agents for the purchase of this mutual fund. Then we have another portion at Merrill Lynch, which is fixed income, and they're holding some of those individual bonds that we're holding to cover the things. They have our cash management account that's used for operating expenses and things, and then they also have two mutual funds that are bond

funds. One is a multi-strategy and the other one is a high-yield junk bond.

The fourth is TIFF. TIFF is really new to me since I got here. It is a series of funds that are designed for foundations only. In fact, I think if you're not a foundation, you can't get in. We're using three out of their four portfolios. We're using a short-term bond fund, which is almost like a cash equivalent, and that has a small part of our assets. We're using them for international equities, and then we're also using their multi-asset strategy that is a combination of stocks, bonds, commodities, currencies, and it's all in varying degrees. They did not have a great year last year, like everybody else, but they've been pretty good, pretty solid. So that's how the four are set up.

*We've talked a little bit about management of the funds in the future, but just as an overall closing question, what do you see for the Foundation more generally in the future?*

I think that there is no conversation about it ending. Even though we've been hit hard from an investment standpoint, it hasn't been that hard. It's been more of a setback. It's taking us back to where we were maybe four or five years ago in terms of a dollar amount, so we can just give less as we're waiting to build it back up. The buildup was pretty recent. They had a pretty big jump within the last five years, so it's not as if we were way high for a long, long time and now we're taking a hit. Hopefully some day when we look back on a graph, it will look like a quick blip, and we'll be mainly going up.

I would say that sustainability is not an issue. I think we're there. I think that they're just on a mission. It's very clear what their criteria are, and they basically say, "Don't even bother if you don't fit." Then

you have to follow their process. This is a really professional group, so my sense is that nothing's changed except for the dollars and maybe not being able to support some things that may be farther out on the margin than their core mission at the moment. They're just taking care of their core, and then hopefully we'll be back to a time when we can support some of these other interesting things that are out there.

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## MARION HANCOCK FISH

*Allison Tracy: Can you tell me a little bit about where you were born, your early childhood, and maybe your education and parents?*

Marion Fish: I'm Marion Hancock Fish. I'm a partner here at the law firm of Hancock & Estabrook, which is located in downtown Syracuse. I've been practicing at this office now for about almost twenty years. I grew up in Syracuse, living in a neighborhood near the downtown area of Syracuse. My parents, Ruth and Stu Hancock, both were born in Syracuse as well, and so our family has been in the Syracuse area for many decades, because it goes back even before my parents' generations.

I went to school in the Syracuse area, graduating from a local country day school for high school. I then went to Pine Manor College outside of Boston for two years, and transferred to Wesleyan University in Middletown, Connecticut. I worked for a year in New York City after that and then went to Syracuse University College of Law for my law degree. I worked for a while, but then took

some time off and started here at Hancock & Estabrook in about 1990.

*What had interested you in law?*

I guess I was certainly influenced by my father, who is a lawyer, and his father was a lawyer as well. There were other relatives, particularly on my father's side, who were in law and politics. I think it was that influence that gave me the idea, and my father and other relatives were encouraging, and so that's probably why I ended up pursuing law.

*My understanding is that your concentration is more towards trust and estate planning.*

I started off as kind of a general practitioner, as most associates do. They don't really know what area to pursue, and I did not, when I went to law school, have any particular interest, nor did I concentrate in law school in any particular area. Then I left the practice, really, for a while, when our children were little, but then returned to the practice in a

more formal way. I did work a little bit part-time during that period, but returned to the practice more formally when I came to Hancock in 1990. The opportunity at that time was as an associate in the Trust and Estates Department. So it was, more than anything, the opportunity that was made available that became the reason that I ended up in that practice area.

It suited me very well because this practice area is more transactional and planning-oriented, rather than litigation-oriented. While I was keeping regular hours, I was not tied to a court calendar and did not have the pressure of preparing for trials and so on. That was good for me, with small children at home, and I was still working in the initial years of my time here at Hancock on a part-time basis.

*Since you've spent so much of your life in Syracuse, can you tell me a little bit about it as a city and as a community?*

Syracuse is a city that, like all upstate New York cities, probably really started growing in the mid-1800s, with a very industry-based population that recently has been declining. The city-proper itself may have a population now of just around 100,000. It might be a little smaller than that, might be little bit more. The metropolitan area, which encompasses the county of Onondaga, is about 400,000. So although the city shrunk, the suburban population has grown a lot over the last hundred years.

It's a city and community that's kind of struggled with the transition from an industrial-based economy to one that the industry has left. For example, GE, General Electric, used to be our largest employer, and I don't know how many jobs they provided—it might have been 10,000— and they're gone altogether. That happened quite a while ago.

We have very few manufacturers left in the area, and those that we do have are dwindling and much smaller than they used to be. Our largest employer now is Syracuse University, so that's been a real transition in the types of jobs and the workforce.

*Can you tell me a little about your family, your husband and your kids?*

My husband, Mike, is a newspaper reporter. He worked for the *Post-Standard* for, I think, thirty-three years, and took a buyout that was offered to him because, like many newspapers, the *Post-Standard*, a Neuharth paper, is struggling. The buyout that was available to him made sense, and so he is now doing some consulting work for companies and writing in communications.

We have three children. They're all young adults. Mike is twenty-seven; he lives and works in New York City. Jeff, twenty-five, lives with Mike and works also in New York City. And our daughter, Ruth, just graduated from college in May. She's had some part-time jobs and no permanent job yet, and is traveling right now in Africa, but will be home in Syracuse in a few weeks.

*My understanding of the weather in Pulaski is that winters are very cold. Can you talk to me about Syracuse in terms of the weather?*

People in Syracuse always talk about the weather. [laughter] Yes, we definitely have four seasons and it's for sure winter right now. It was supposed to be one this morning, but it didn't seem that cold to me. We are in the snow belt. We get snow off Lake Ontario, because we're to the east of the Great Lakes.

North of here, where Pulaski is located, is in a little higher-elevation area called the Tug Hill Plateau, and so they get more of the lake-



effect snow off of Lake Ontario than we do in Syracuse, but sometimes we get a lot. I love it. I appreciate the snow. You have to embrace it. You can't complain about it. It's just part of our experience here. There are places to ski and you can downhill and cross-country and snowshoe and get out and walk in the snow. Shoveling is good exercise. You have snow tires and you don't drive fast. You just make the most of it.

*As a lawyer and in what you practice, what takes up most of your time or what are the things that you find yourself doing the most?*

Probably what I do the most is have conversations with people about their planning issues and concerns, counseling people about what will happen with their assets and what could happen. I deal with tax questions, what tax problems could there be, what family issues might there be, and structuring things through the tools that we use, including wills and trusts and business entities and contract agreements and so on, to minimize the kinds of problems that they could be facing.

I spend most of my time counseling on things like that and how to deal with family issues, second-marriage scenarios, children who have problems. I also counsel quite a bit on managing businesses and often in the context of not-for-profits, discussing the duties and responsibilities of fiduciaries who are managing a not-for-profit organization. I just got a call today from somebody about one. Those are pretty common things that I would be discussing. And trust and estate administration—how these things are managed day-to-day with accountings and distributions from estates and trusts and the court filings that go along with the administration of those things.

*Correct me if I'm wrong, but my understanding is that based on your experience and what you focused on in terms of your practice, a lot of those specialties are why you're serving with the John Ben Snow Foundation.*

Yes, I would say that, from my experience with fiduciary responsibilities and in dealing with not-for-profits, I have some professional experience that relates to the activities of the John Ben Snow Foundation.

*Prior to becoming a part of the Foundation, what did you know about the John Ben Snow Foundation?*

Probably nothing. I don't think I heard about it until I met Ann Scanlon, and I probably met Ann when I became formally involved with the Central New York Community Foundation, which is a public foundation, as opposed to the Snow Foundation, which is private. Through my work with the Community Foundation, I think we had some joint meetings or I encountered Ann, and that was how I learned about the John Ben Snow Foundation. Ann, through her Snow activity, was probably getting information and interacting with some of the organizations that the Community Foundation was also dealing with.

*How did you ultimately become involved with the John Ben Snow Foundation?*

I think after Ann had gotten to know me a little bit better over a few years, I was contacted by Ann and Jonathan and asked if I'd be interested in pursuing an active role in the Foundation. Of course that interested me very much because I am and have always been in my professional career, involved with community organizations. I mentioned the

Community Foundation. I've been involved in others as well. I now knew about the Snow Foundation and what their work does and how it would continue to help central New York as well as other organizations across the country. I thought it sounded really interesting, and so I said yes. I actually participated in an application process or a review of sorts, where I was interviewed by some of the board members, who then invited me to become a community advisor to the Foundation.

*So as a community advisor, how is that different than just being a board member?*

Well, it's quite different. I am not a fiduciary. I do not have an actual fiduciary responsibility. My role is informal in nature, and although I have a voice and can express opinions and have, since I've become an advisor, attended and been treated as if I were a member, my vote doesn't count. I'm just assisting and providing guidance, but not in the legal sense.

*At the meeting where they were interviewing you, do you remember the sorts of questions that they were asking or what they were looking for?*

I think they wanted to know about my community experience and what my interests were. It was more about me and about my background, about my having been in Syracuse my whole life, and having been involved with other charitable organizations locally. I also think we probably talked about my law practice and the fact that I do trusts, estates, and tax work and provide guidance for not-for-profits and so on, and that interested them as well. That's my recollection.

*Do you remember who was at that meeting?*

Well, it was on the phone. I'm trying to remember. I think I went over with Ann to the Foundation office, and probably Ann and Jonathan were there, and then a couple other people might have been on the phone. Frankly, I don't remember, but it might have been David Snow and there might have been one other person.

*When was this?*

That would have been probably 2007. Don't hold me to that.

*Okay, I won't. [laughs] Do you remember the first meetings you started to attend and who was around at that time?*

Well, I think the first activity would have been with Val and Emelie, I guess, and Jonathan and Ann. That would have been meetings here in Syracuse before the annual meeting, to kind of vet some of the projects that were on the table for grant-making. We actually would have been making site visits, and following site visits we would have then spent a good part of an afternoon going through the grant requests and making decisions about what recommendations to make at the annual meeting.

*As a community advisor, do you attend all of the meetings that board members attend?*

Yes, I attended the grant-making meetings that occur before the annual meeting, and those have always been in Syracuse. The idea for me as a community advisor is to kind of assist Ann and Jonathan in the vetting of some of those projects so that when it comes time to sit down and talk with the Grant Committee,



we've got one more person who's got some knowledge, actual knowledge about the grant-seeking organizations.

*Do you remember that first year that you had started working with the Foundation, what kinds of grants were being given out and what areas of focus that they were being given in?*

Well, there would have been—is it a hundred? It might be more. It's a lot. It's several pages we'd go through. They could be for almost anything except they traditionally have not been big supporters of medical and health issues, but just about anything else is fair game. Libraries is one area that they've traditionally been very supportive of; art; art education; education; legal aid; youth activities; summer camps; mental health. There are so many, it's really wide-ranging. They have had environmental education projects. There's really no one focus. In general, their preference is to give for projects in capital and not for budget, [meaning] not for just general expenditures.

*Have you in the years that you've been involved seen any trends in giving or in applications in terms of what people are asking for?*

No, I haven't been around long enough to get a real sense of trends. I've heard that there was a concern maybe not this year or not last year, but maybe the year before, that the quality of the applications didn't seem to be quite as good as what they'd received in prior years. But, again, because I don't have the longevity of experience, I don't have a good sense of that personally.

*Can you talk to me about the process that people who are applying for monies go through in terms of what the application process is like?*

They have to express their interest before the end of the calendar year, so we need to hear from them by letter before December 31, for a grantee to be on our list for consideration for the following year. We then have that list in hand of all those who have expressed an interest in applying, and then they follow up with completing their applications.

Jonathan and Ann, with my assistance, will then go through these inquiries and assist these organizations if they need help in getting their applications done. Then I think their applications have to be completed by sometime in the spring. We will then pick some of these organizations to do site visits with. Some of the site visits will be by us and then we might do follow-up site visits when the committee members come to town. That's when we actually sit down and make some decisions. It would be at that time that Jonathan, Ann, and I would express our opinions to add to the discussion based on our own experience or knowledge of the organization involved, and perhaps our own personal site visits.

*Do you remember any specific organizations that you've done site visits with and what they were like?*

I'm trying to remember the names. There's a horse farm and it was Jim Marshall Farms Foundation. It was in the East Syracuse, Manlius area and they provided therapy for people with mental illness. I'm not going to remember the names of all of these. I remember that site visit.

I remember also a site visit to... I think it was the Booth House with the Salvation Army, to look at requests for some capital funds to make some changes to the house for a project they were working on.

I remember my personal site visit to a clinic in a medical building. The clinic is part of an upstate program for families with children, providing medical care. Part of the outreach from the clinic involved a coordination of effort with S.U. Law School and a clinic at the law school. They worked with the families getting medical treatment to assist those families with legal issues they might be having, particularly with immigration and landlord-tenant issues or any other legal issues these families might be dealing with that could be adding to their stress on top of the medical issues that they were getting addressed at the clinic.

*Can you talk to me a little bit about the difference between the Trust and the Foundation and what areas that they fund?*

I can't give you all of that, but I can tell you what I do know. I'm not involved with the Trust because the Trust is managed by the trustees. So the Trust does come into play when we're looking at the total dollars requested and whether the applications for grant monies are also made to the Trust and the Foundation. I think most people who submit grant applications fill out paperwork so that a trust request can be considered as well. So while I would not be participating in any active decision-making on a trust, it's my understanding the Trust supports many of the same projects.

*In terms of the area where the organizations are actually located, does the Foundation focus on the central New York area?*

Yes, they focus on the central New York area and then there are some projects that are kind of special for Pulaski.

*For the Foundation, you talked a little bit about how you, Ann, and Jonathan look at the applications and make recommendations. Can you talk to me a little bit more about that process and how long it takes?*

Well, most of the work is done by Jonathan and Ann, and, of course, Ann is the paid staff person and Jonathan is just more hands-on. They are receiving those applications now and working with the grantee organizations, answering questions as they're completing their paperwork.

I'm looking at this list for 2010. It's six pages, and there are probably fifteen on each page, so that's a lot of inquiries. Not all of these will end up being applications for 2010. Some of these people probably won't finish; they won't get the paperwork done. But it's a process now of working with these grantee organizations and then receiving the applications. Once the applications are received, we'll go through them and prepare them for our meeting in May; that would mean completing some summary pages—just the basics—so that they can be reviewed when they get together. It also means picking out a few that might make sense for us to go visit when we have that May Grant Committee meeting, because when the two committee members from out of town come to join us, we always try to conduct some additional on-site visits.

*In terms of the application that people have to submit, how long is it?*

The form itself is not that long, and they do vary tremendously in length, depending upon how much information they provide. The form has been supplemented by all of the responses to the questions.

*Does the Foundation ever solicit any applications, that you know of?*

I do not know that, although they might have done it on occasion. For example, in response to 9/11 or after a disaster, they may make some gifts. So those wouldn't, then, require an application, but there would be a distribution.

*Is there an average amount that you give to people or is that varied?*

I would say anywhere from \$1,000 to \$25,000, and then occasionally you'll see something more than \$25,000. A good average would be \$10,000 to \$15,000.

*Because you're not funding the operations of an organization, do you think that people are trying to implement a new project with grants?*

Yes, or they need a piece of equipment or some research conducted or some discrete thing.

*As an advisor, have you attended the yearly meetings?*

Yeah.

*Which ones have you attended?*

The Syracuse one in '08 and the Reno one in '09.

*Is there anything about the Grant Committee that I'm not asking about?*

The Grant Committee function is something that I'm kind of familiar with because it's not unlike what we did at

the Community Foundation. It's always a challenge to hear the requests from so many needy organizations, and almost all of them succeed in making a compelling statement about what they need, why they need it, how much and so on. I'm usually pretty familiar with at least some aspect of the organization, some of the people involved, or projects that the organization has successfully implemented.

At the Community Foundation, we had to go through the process of vetting all of these and making the hard decisions about whether or not to support them, and if so, then for how much. It's kind of a fluid process and it's one that is not always comfortable. Having done it at the Community Foundation, it wasn't a process that was foreign to me, so it was not so difficult for me to jump in and be an active participant and to be comfortable with this.

*When you think about organizations that you'll give money to, are there ever questions of liability?*

Absolutely. If the organization is brand new, that could be a concern, or if the organization has financial statements that look bad because they have a lot of debt, or their budget is not balanced, then those definitely are red flags.

*Do you consider organizations that you've given to before? Do you like to give to a lot of different organizations or do you encourage people to reapply?*

Again, I couldn't say definitively. In my short few years of experience, I would say that you do see organizations coming back. We keep track of that, too. I know that that's one of the things you see on the summary

page of the grant application—how many times did they come to us before, how many times have we said yes, and how much have we given them over that time period?

*Do you ever consider how successful previous projects have been?*

Absolutely. That's on that summary sheet, too—did they give us a report back? I don't remember specifically if it says if there was a problem or something. The problems would be if we didn't get a report back or if they had to give us back the money because they couldn't complete the project.

*In terms of grant reporting, do you require just one final report or are there any sorts of quarterly reporting requirements?*

They have to give a final report. Ann collects those and I don't think she really does much with those, as far as I'm concerned, unless there's a problem.

*Understanding that there are not specific areas that the Foundation looks to fund, are there larger guiding principles for what grants you give out and how you distribute the money?*

None that aren't just fundamental, such as it needs to be for a good cause and the project proposal must look prudent and responsible.

*So, more common-sense guiding principles than anything?*

Yes.

*What sort of a time commitment, would you say, over the year, your involvement with the Foundation requires of you?*

Maybe ten days of work, total. That would be counting attending the annual meeting. It might even be a little bit more because then we have the site visits, so it depends upon how many I might do in advance of the Grant Committee meeting.

*You'd mentioned the Central New York Community Foundation, but can you talk a little bit about the other organizations that you're involved with?*

I was past chair of the SUNY Environmental Science and Forestry College Foundation. It's a local state school and they have a foundation, and I've been involved in that. So I chaired that foundation and I continue to be involved. Right now I am assisting on a capital campaign that they're doing. I think that foundation has asked the John Ben Snow Foundation for funds in the past. The Community Foundation would never be seeking a grant from the John Ben Snow Foundation, because they give away money; they don't seek money.

I'm also involved with the Visiting Nurse Association of Central New York and am currently chair of their foundation. They deliver homecare with nurses and home aids here in central New York. Those are the main organizations.

I'm also president of—and this is professional—president of the Onondaga County Bar Association. That's the membership organization for local attorneys. I'm involved with the New York State Bar Association as well.

*Are there any final thoughts that you have about the Foundation or anything that I haven't asked you about?*

It's just my perception that it's pretty extraordinary for a family foundation such as

this to have the will to be perpetual. I mean, it's going to keep going. There's no question in my mind that the officers and directors take their responsibilities very seriously and are really committed to conducting business properly so that the Foundation and the Trust will be there forever.

*So beyond the grant-making, there's a responsibility to maintain the money that they have?*

Absolutely. The grant-making can't occur without good stewardship.

*Do you feel that that is uncommon for a lot of foundations like this, to be so responsible?*

Yes, especially for a much newer one. Just thinking back to when it would have been initially established, had those involved in the outset not really taken it seriously, the money could have been spent kind of willy-nilly and within a few years, poof, it's all over. I'm guessing that that happens fairly often with private foundations, where the family members—well, I know this from my practice—where the family members don't really understand what they're getting into. But this has evolved now to the point where it's much more sophisticated than just a small private family foundation. It is now like a little business and it's run like a business and it should be.



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VALERIE A. MACFIE

*Allison Tracy: To start out, can you give me some background on yourself—where you were born, what your parents did, where you went to school?*

Valerie MacFie: I grew up in Westfield, New Jersey. I was born at Overlook Hospital in Summit, New Jersey. I'm the third daughter, and graduated from Westfield High School in 1975. I went to Centenary College in Hackettstown, New Jersey, and graduated from there in June of 1977. I got married in September of 1977, and moved to the Freehold, New Jersey area.

I raised two kids in the Freehold area, and worked for the YMCA since 1978. When we moved down there, I got a part-time job with Freehold Y and worked there for three or four years before I had my children, took a few years off, and have been back ever since. I've been in the position I'm in right now, assistant aquatic director, since 1995, and love it.

*Does being an assistant aquatic director involve teaching lessons?*

I teach, but I also hire, supervise, and train all of the swim instructors. I probably have a staff of thirty to forty swim instructors, mostly high school age. I used to run the lifeguards as well, but now somebody else has that, which is great. I also oversee the water exercise classes for all different age groups, as well as the lifeguarding and CPR classes.

*How did you get into swimming?*

My dad's a swimmer. We were taught to swim from the time we could walk, I guess. It's funny, it was all my dad's side of the family. His parents were big swimmers. My mother couldn't swim a stroke. I don't remember ever seeing her get in the water, so it was just kind of following my dad.

The YMCA has always been a really big part of our lives. I went to YMCA day camp, YMCA sleep-away camp. That's actually where I met my husband and that's where I was on the board for six years—the Camp Speers Eljabar in Dingmans Ferry, PA. So we met there. I was a junior counselor and he was maintenance.



*What year did you meet?*

1973.

*Did you compete at all in swimming?*

It's funny—my dad was a competitive swimmer, but I was not. I went the lifeguarding/water safety instructor route, and became an instructor and a lifeguard. My older son, James, he was on a swim team at the Y. So, you know, it just skips a generation.

I taught backyard pool lessons for two years, and that was horrendous. Eighty miles a day in your car and just traveling all over Monmouth County doing backyard-pool swim lessons. Best tan in my life, though.

Westfield is Union County, which is the middle of New Jersey, or what I call the waistband of New Jersey, and it's just above that. We moved two counties away. Monmouth County is right in the middle of New Jersey.

*Do you like it there?*

Monmouth County is really nice. It's being built up a lot, like everywhere else, but we have a great place to work and I love the people I work with. It's a nice community. It's a nice area.

*I think that you said this, but tell me again where you went to college.*

I went to Centenary College for Women in Hackettstown. I had come from a high school where the graduating class was 750. It was a big high school, Westfield High School, and my college was less than that. I think it was 600 girls, total. So I went to a place where you could really get involved and do all kinds of things. I was assistant editor

of the yearbook and social chairman of my sorority and a lifeguard and swim instructor there. It was just an opportunity to really get involved, whereas at Westfield High School, the competition was so intense that to do anything was hard.

We graduated in the Armory. The Armory was right across the street from the high school. My parents had gone to Westfield High School, but their high school was a grade school by the time I started school.

*This is a big jump, but can you tell me how you got involved in the John Ben Snow Foundation?*

My dad, Allen Malcolm, had named his brother, Bruce Malcolm, as his successor because the Foundation is also connected to the John Ben Snow Memorial Trust. There are three trustees. Allen is one of those trustees. So he had to name a successor, and his brother had been his successor and that's why his brother was on the Foundation. As we got older and got to adulthood, he thought about changing that. I think because of my work with the YMCA—the YMCA is a service organization—and my involvement in my church and things like that, he chose me. So as his successor, I was invited to come to the Foundation meeting and was voted onto the Foundation. My Uncle Bruce was also there, so he stayed for many years. I think last year or the year before was his last year.

*Can you give me a timeframe for when this happened?*

About ten years ago was my first meeting, at Squaw Valley. I remember we flew out to San Francisco and then drove to Squaw Valley, and it was great driving through Truckee Pass. It was beautiful. So that was my first meeting. That was really nice.



*With your father and uncle having been involved with both the Trust and the Foundation for so long, what was your understanding of it before you had joined the board and really gotten involved?*

As a kid growing up, we had always heard stories about John Ben Snow. My grandfather was his lawyer and helped him set up the Foundation. I'm sure you got a lot more of that from people who were actually there, which I wasn't. But to me, it's a family involvement going back to my grandfather and his involvement, so it's just something that's great to be able to carry on.

*Can you tell me a little bit more about your grandfather and the work that he did with John Ben Snow?*

From what I understand—and again, this is just from stories—Talbot Malcolm was a lawyer in New York. I'm not sure what company he worked for, but some of his clients were the Woolworth family, and that's where the connection to John Ben comes in. John Ben worked for the Woolworth family, and made his fortune with the Woolworth Company. My grandparents were very fond of the Woolworths. We have a picture of my grandmother christening one of their yachts. It's a great picture. So they had traveled and gotten to know the Woolworths pretty well, I think. It's an interesting connection. I've read the book about John Ben Snow. Just amazing. He ended up out in the West in Colorado Springs when he retired from Woolworth and got involved with Gannett Newspapers and Speidel Newspapers.

I know my dad used to go to Colorado Springs to the John Ben Snow meeting when John Ben was still alive. He always brought me back *Western Horseman* magazines, which

I loved, because I took horseback-riding lessons. That was a really neat connection.

*When you first came on the board, can you remember who were both the board members and the trustees?*

Of the trustees, I'm trying to think if Vernon had passed away by then. He might have passed away the year before, because I don't remember ever serving on the Foundation with Vernon Snow. I think he had passed away. Jonathan and David were both there. Rollie Melton was president, I believe. Rollie was Emelie's dad, Marilyn's husband. So Marilyn was not on it, but Emelie was his trustee successor. Jonathan had already stepped into his dad's shoes as his trustee. I'm trying to think if there was anybody else. Bruce was there. Allen, Bruce, David, Jonathan, Emelie, Rollie and myself.

*What was the board like when you first joined?*

I guess my feeling is that they have a lot of expertise in financial matters. There was a lot of financial investment discussion, and I was getting a better sense of what the Foundation was all about. I don't have the financial background or the legal background, and I think the most interesting thing for me was to be involved in the Grants Committee. I go to the Grants Committee meeting up in Syracuse every spring, and it's really fun to see how we make a difference, and actually see and meet the people who we give the grants to in that area. Jonathan and Ann [Scanlon] and I, as well as Bruce—for many years, Bruce was on the Grants Committee—we would meet in Syracuse and stay at Jonathan's house and do site visits and get to see a lot of the people who we helped—some really, really interesting people.

One of them stands out for me—On Point for College. A woman who was a CFO at a big company decided to help one of her son's friends get into college. She was so good at it that they started bringing more friends, and pretty soon she started her own not-for-profit. It's a great, great thing that she does. It's really interesting to see how people help other people; I love working with all different ages.

*How long have you been on the Grants Committee?*

I think I started maybe the second year that I was on the Foundation, so it's been nine years.

*Are there any guiding principles or areas that the Foundation likes to focus on?*

For the Grants Committee—and this is a focus from John Ben Snow, what his wishes were—the focus is on youth first. We have a bunch of different categories that we give to—environmental causes, Americans with disabilities to enable people to put in a ramp for handicapped access to libraries. We've done a lot of that—helping YMCAs expand some of their programs and be able to have handicapped access as well. Journalism is a big area of support. The journalism support comes through the Gannett newspapers/Speidel newspaper connection, but also through Vernon Snow. Vernon was an English professor at Syracuse University and that's where I think the focus on journalism comes from.

*Is giving to environmental causes a recent area that you've started to focus on?*

No. I think what we tried to do, or what they tried to do in the past, after John Ben

Snow passed away, was to continue the things that he loved. He loved the outdoors. He had a ranch. When he was in England, he was the head of Woolworth, Ltd., in England, and helped get that going. He owned an estate called High Fields, and he had horses and polo ponies. I think he always loved the outdoors, and he would have definitely been on board with the environmental movement to protect and preserve, so I think that's a really big thing.

*In terms of the grants that you give, do you focus more on program expenses? Do you ever give money for operational needs?*

We have started to recently because of the economy. When we have a good relationship with somebody, we have started giving operating funds to keep them going in bad times like we're going through right now. But generally speaking, we like to give grants to something concrete that we can see and measure.

One of the site visits that I did for the Trust was to the Reading for Blind and Dyslexic, and one of the things that we were giving them was the computers to change over from cassette tapes to disk. They were going to convert their whole library of books, and they needed this computer system to do it. So we fund things like that.

*Can you walk me through the process of the Grants Committee and how you go from receiving an application or approaching an organization and talking to them about the grants program?*

We don't really approach people and say, "Hey, we have money to give." We are on the Internet. People can find us, and they do find us. We've gotten a tremendous number

of grant applications. Then we have to cut it down to what we can actually manage. We do have good relationships with some organizations that we give returning grants to.

They have to have the application in by a certain date, and what we look for is that they have a good solid background. Most of the grants that we give are in the central New York area. We're looking for maybe a relationship with other foundations, if other foundations in the Syracuse area have been on board with the grantee, and that they're a 501(c)(3) and they meet all the legal requirements for us to give.

*Do you get a lot of the information through the grant application that you have people fill out?*

We get some of it through that, but Ann, especially, and Jonathan as well, because they live in the area, if it's a new grant and they don't know it, they'll go out and do a site visit. They'll meet with the people and they'll get to know them. Again, they'll call around and ask the other foundations in the area, "Do you know of this entity?" A lot of times a new grant application might be something that somebody we already know is doing, so it's sort of repetitive. Maybe they're trying to do the same thing. Or we'll stay with the one that we know because we've supported them in the past, or it's a relationship that's already there. But the new grantees, they're researched. I think Ann does a great job in doing that.

When we come up in April or May and meet as a Grants Committee, we go on a couple of site visits, usually on Friday and Saturday. Then we meet Saturday afternoon and we go through all the applications. Jonathan and Ann, because they've been on a lot of the site visits for all of the new ones, or even the old ones with new projects, will

make recommendations and will discuss those recommendations. Then we decide who's going to get what we have to give.

*In terms of the calendar year, when do you receive applications, and when do you give money?*

Ann would probably know a little bit more about the deadlines, but there are deadlines. The grant applications have to be in by January 1st. When the Grants Committee meets in April or May, then they're notified that, yes, their grant application has been accepted, or we tell them, "Try again next year. It doesn't really fit." We do encourage people to come back the next year. We do have some that we hold over or that we'll transfer to the Trust because it's more applicable to the Trust. The Grant Committee for the Foundation also does small grants. They're, I think, usually below \$10,000. It's not any set amount, but we try to get as much as we can to as many people as we can.

*Money is actually distributed in July, is that right?*

It depends, because we have a calendar depending on what their project is. If their project starts in September, they need the money before September, so we try to do it that way. We take a look at what each grant is and when the best payout time would be for that. Some of them are held off till December, some of them are right away, and then some are staggered through the summer.

*That's interesting. Is there a separate Grants Committee for the Foundation and Trust?*

No. The Grants Committee is for the Foundation. The trustees are their own Grants

Committee. The three trustees—Emelie here in Reno, Jonathan in Syracuse, and Allen in Maryland—have connections and they’re able to give to whatever grantee contacts them. Jonathan deals mostly with New York State. Emelie, of course, is in Reno, so she’s dealing with this area. Allen, because he’s got a house in Florida, also has connections in Florida, Maryland, New York, New Jersey—from all the different places he’s lived. So I do site visits for him in New Jersey for the Trust.

The trustees decide where the money goes. They do meet as a group—I think they conference-call—and again, it’s before this weekend. They conference-call and they go through all of their grants that they want to give. If one of them had an objection, they could voice that objection and say, “I don’t think that’s a good idea to give money to them. What do you think?” So they discuss it that way.

*For the Grants Committee for the Foundation, are you on the same page in terms of who you decide to fund? Have there ever been any—*

Arguments? Sometimes. I like to call it discussion. But I think the thing that strikes me, because I kind of still feel like I’m a new person to this, even though I can’t believe I’ve been here ten years, is that when you go on site visits and you actually meet people, you see what the difference is. When you get down to maybe changing the recommendations, somebody on the Grants Committee might say, “Well, you know, I don’t think that this grant is as good as this one that we did the site visit for. I would rather see the site visit person get the full amount that they’re asking for.”

I asked a lot of questions like that when I first started on the Grants Committee. How do you decide how much they get, and why

do you almost always give them less than what they’re asking for? Some of the answers are basically you want them to strive to get money from other sources. Some of the grants that we give are matching grants, so we’re giving them half and saying, “See if you can match it from somebody else, and we’ll match whatever you raise,” which is a great way to encourage people to look for other sources and not depend on just one source. It’s good for everybody, I think, and it makes it a healthier relationship.

For some of them, we have been so impressed when we met with them, that we’ve said, “We want to give them more. We want to encourage them and help them out.” I find the best part about being on the Grants Committee is the site visits.

*Have you seen a difference in the types of grants or the types of organizations that are putting in applications?*

Every year you get some that are inappropriate. You get some that don’t fit our criteria of, number one, being a 501(3)(c)—a not-for-profit—and something that’s going to help other people.

We’ve had some funny ones. I think Dad got one for the Trust that was some guy with a private island that wanted to preserve the private island, but not for anybody else, just his own use. Generally speaking, though, if there’s a problem with a grant, it’s usually that the information that we need isn’t all there. For example, they have to give us a copy of their financial forms so that we can see how they’re doing.

They do have to report back on how they use the money. Very often Ann or Jonathan will do a follow-up visit to see how it came out. It’s not carved in stone, but that’s why we do things that we can measure and things

that we can see. We don't really support staff salaries or things like that.

One of the things that we did for a grant site visit last year when we went to Syracuse was a bird watching station. I'm not sure what they called it, but it was up on a hill overlooking the Great Lakes, and apparently thousands of hawks fly over this one area. We helped fund a board that would describe all the different kinds of birds, so that the people who are up there cataloguing and counting them could see this stuff. School groups go up there as well, so it was an informational, educational board. It was beautiful. It was done by a local artist.

*For the grant reporting, how extensive is that report?*

It's required for them to do it. I don't know whether there have been any times when we've gone back and said, "You didn't report to us what you were supposed to report. You have to give the money back." I don't know if there's been an instance where that has happened, but we do track that. We do go look at what they've done. Sometimes there are groups that struggle, that aren't able to do what they needed to do, so we'll renegotiate with them. Sometimes it's something where they had a project planned and they were unable to do it, so they ask, "Can we use the money towards this other building or towards something else?" We're pretty flexible with that.

*You've mentioned a lot so far, but are there other organizations that you funded that stand out in your mind as being—*

Some of my favorites? We do a lot of therapeutic riding for kids with disabilities, and adults as well. I actually went and visited

one of those recently. But the Foundation gives grants to those too.

Pulaski, New York, is where John Ben Snow was born and raised, so we give a lot to Pulaski. Over the last ten years, instead of giving the town all these grants, they've been trying to teach them to fish instead of just giving them fish. We actually had a plan where we were going to help them build an endowment fund so they could provide their own scholarships. We do support scholarships to the Pulaski High School for college. I think that's a healthy thing. I think that's a great thing to not say, "Here, we're going to give you money every year," but to teach them that you can build your own fund and you can reach out and start your own foundation, which they've done. So I think that's a really healthy thing.

But some of my favorite ones? On Point for College, I talked about that a little bit. Some of the things that they do—they have over two hundred volunteers who drive kids to school. They help them fill out the applications to get into college. A lot of these kids are from families that are single-parent working poor. They're not on welfare, but they definitely can't afford college. Their parents can't afford to take them and they can't afford to get them for holidays and things like that. So what On Point for College does is they help them through the whole process—they drive them to school, they give them a backpack with sheets and towels and a toothbrush and toothpaste, and they hook them up with a mentor that On Point for College has connected with so they have somebody on campus who can help them. They also very often have other kids who have been through this program on campus that they connect with. When those kids need a ride home at Thanksgiving, the volunteers go get them and then take them back. So they really help them



through the things that nobody else helps you with. The On Point for College staff go to all the graduations, which is amazing.

We were so taken by what they do, we asked Ginny Donohue, who's the person in charge who started the whole thing through her son, if she was going to build a model. Can you somehow document this so that other towns and other cities could do the same thing? She's just so busy that she can't; she doesn't have time. She goes to I don't know how many graduations a year.

Now what they're trying to do is ask the graduates to come back to Syracuse to the grade schools, actually to the sixth graders and the eighth graders—the kids who aren't even thinking of college yet—and talk to them about their path and how they did that. There were kids who were brilliant kids, very smart. One of them was one of the Lost Boys of the Sudan. They were relocated to Syracuse. Syracuse is a big refugee area, and always has been, which seems silly. You're sending these people from the Tropics to the snow. Anyhow, it's a big refugee area. This one boy was brilliant, and had gotten into a very good college with a full scholarship. He didn't have thirty-five dollars to send in with an application or a form that he had to send in, and he would have missed going if Ginny Donohue hadn't stepped in and said, "Here's the thirty-five dollars." Then she found out through him that there was another kid in the same boat. She took him, too. They're a lifeline. It's amazing.

That's the most amazing one. Guys from the Syracuse University Science Department, who started encouraging people to sell native plants, wrote a beautiful book on native plants of North America. What they're doing is, instead of walking through the woods and seeing a wildflower and saying, "That's beautiful," and picking it, they're trying to

educate people not to do that, and instead of putting marigolds in your garden, put native plants that would have been there and that can survive better. It also encourages the nurseries to propagate native plant species. So that was good. I liked that one.

Just a lot of youth programs, a lot of connection with things like Big Brothers, Big Sisters, supporting their programs, mentoring in the schools. You know, those kinds of things, like just giving everybody a hand. History is another category, museums. I had no idea that the Secretary of State under Abraham Lincoln was also almost assassinated.

I'm trying to think of who he was and I can't. We went to Auburn and we visited his house. His name escapes me right now, but he was stabbed. A man was connected to John Wilkes Booth, and they were going to assassinate the whole cabinet, the president, and the vice president. That was the plan. So this man ran into their house and ran upstairs, where he was sick in bed—he had been in a carriage accident—and he was in bed and the man stabbed him before one of the sons-in-law or somebody wrestled the guy to the ground and the guy escaped. I had no idea. He survived the carriage accident and the stabbing.

In the museum they've got his bloody pajamas. It was really amazing because the museum was closed at the time, so we got to see everything. We saw the downstairs that everybody sees, and then I said, "Can we go upstairs?" So we got to see the whole house.

There's another grant that I thought of, this guy who started in a really gang-ridden area of Syracuse. It looks like a little storefront, but it's a computer center that teaches kids how to use computers. He was so popular teaching these kids how to use computers, it became like a safe ground where kids from

either gang area could come. He also started teaching the parents—the moms would come and learn how to use computers and learn computer skills. That was a really touching one. I think that was a great one because it was pulling up the whole community, in an area that really needed it.

Another one was an environmental center that asked for money to buy a van. They drive into Syracuse and they take things about the environment and animals—they have stuffed animals with them and all kinds of things—and they teach the kids about nature by bringing it into the city. They try to encourage them with field trips and whatnot, to go out to their site outside the city, so that's kind of neat too.

So just environmental causes, things for kids, therapeutic riding—those are the ones that I remember.

*Geographically, what area does the Foundation focus on?*

I believe it states in our literature that it's central New York, like the Syracuse area. That's where John Ben was from—Pulaski. It's a depressed area in New York State. You don't think of New York City as a depressed area because it's the financial capital, but upper New York State has areas. If you drive up through the state to get to Syracuse, and in Syracuse itself, too, it's very depressed. There are a lot of old farms that are just left, and a lot of people really, really struggling. There are a lot of problems with education and literacy and things like that. I think they're doing a really good job in Syracuse. I think the John Ben Snow Foundation is making a big, big difference. It's fun to be part of that.

*Can you tell me a little bit about who the officers were when you started on the board?*

Rollie Melton was president. I think my father was maybe secretary/treasurer. For the Foundation board, before I got on it, there were not as many officers. I think Allen did a lot of it himself. Then Rollie got sick the following year and passed away while he was president. I think my dad had been president for seven years. I don't know if it was the first meeting that I was at where Rollie was elected, but Rollie was president the next year, and then he passed away. So he really wasn't president very long. His health was bad, but he was a sweet man, a really sweet man. I'm sorry I didn't get to know him a little bit better.

*My understanding is that the Foundation board members don't necessarily do as much with the Trust, but do the trustees do work with the Foundation?*

The trustees are all on the Foundation and the trustees' successors are also on the Foundation. Emelie's successor right now is her mother, Marilyn, because her children are too young. When her kids are out of college or whatever, she might change that and name one of them as her successor. That's how I got on the Foundation as well. Bruce retired, and what was sort of unusual when he retired was that we held nominations, and he nominated his daughter, Laurie, who's my cousin. We were looking for somebody with a financial background, and Laurie has that. My dad nominated Angus "Gus" Burton, who is my cousin Dana's husband and has worked in finance as well.

Then we met with all of them. We interviewed Marion Fish, who is on the Grants Committee now. She's a local person from Syracuse, and has been involved with the Syracuse Foundation and other foundations there. She's a lawyer in Syracuse and has a real good background with foundations. So right

now she's on as a committee member and a community advisor/consultant. Someday she might be on the board because she's a big help. She knows everybody.

We interviewed another gentleman as well from the Syracuse area, who Jonathan nominated, and he nominated Marion as well. So we interviewed everybody and then voted and we voted Gus (Angus) onto the Foundation. His first year was Colorado Springs. He came with us to that, and everybody got to meet him. So there have been some changes to the Foundation crew, with Bruce leaving and Gus coming on.

*My understanding is that you're the second woman to serve on the board after Emelie?*

Emelie was the first.

*Do you know, when did Emelie come on?*

Her dad was a trustee. I think her brother had been named as trustee successor, and he was having some problems, and so Rollie changed it to Emilie, and Emilie was voted onto the Foundation. So she started coming. I don't know whether she started coming a couple years before me, but I think it's been at least a couple years before me, which was a big change. If you look through the history of the John Ben Snow Foundation, it's been all men. Now it's changing. It's a good thing.

*Besides Rollie needing to change his successor, was there anything else that triggered women coming onto the board?*

I don't know how John Ben would have felt about it because he was said to have not really liked women. He never married, he never had children. Yet my grandmother said he was always so charming and so pleasant

to her. She enjoyed him so much, and my mom felt the same way. I think he just chose not to marry, for whatever reason. You can't rewrite history from today's viewpoint, and I think back in the fifties—actually 1948 or something—I don't know what the exact date was, because it's been sixty years that we've been in operation, but I think back then it was just good ole boys. It was you and your cronies, and that's kind of how it started. He had people from Gannett newspapers, and his connections were the people who he asked to be on the Foundation. It started with this newspaper, the Snow family, and the Malcolm family with Talbot as his lawyer. Those are the three components of it, and it's just kept those three components.

*What kind of business is conducted in the few days of your annual meeting and what sort of things do you consider?*

Today the Foundation meeting is almost always on a Friday and the Trust meeting is Saturday morning. At the Foundation meeting, we usually hear from our financial managers, which we diversified quite a few years ago. Instead of having all our money with one manager, we spread it out now. We meet with all of them on Friday, and find out how we did, and how much money we have to give. We get the exact amount, and then the afternoon session will be about the grants.

Ann, as the program officer, will report on all the grants. What we've done is we've taken the seventy-four grant applications that they received and cut it down to, I think, thirty-something. Those are the ones that the Grants Committee recommend. Ann and Jonathan, mostly Ann, have documented that. They have a list, and she'll go through the list and she'll talk about each one. She'll talk about why we feel that this is a good grant to give



to right now. She'll also talk about how the Grants Committee came to those decisions, and how the site visits went. Unfortunately, this year I didn't go. Emelie and I both did a conference call. I really missed it, so it was tough this year to not go. That's what we'll do, though, and then the grants will be approved. The full board approves the grants.

Then at the Trust meeting tomorrow, it is the same thing. They'll start out meeting with financial advisors, the people who manage our assets. Then they'll go through all of their grants. Each trustee will go through their grants, and it just opens it up to discussion.

The trustees' successors usually go to the Trust meeting, but we don't have a vote. We basically just sit there. We sit and we listen and we learn, which is good.

*Besides the meetings, what sort of other things do you guys get to do this weekend?*

It feels like family. It feels like a family reunion, again, because the three components have been connected for so long, for sixty years. You can't wait to get back and see everybody. Usually a lot of the extended family comes, so the guys bring their wives and sometimes the kids. We get to see them and how they're growing. It's kind of neat.

We usually do dinners, of course, and the financial advisors who come out and do their reports, some of them feel like part of the family, so they also come out to dinner with us. We usually see a show or something. It's fun. It's really fun.

It's always something interesting. I know last time we were in Reno, we went to Marilyn's house and they had some kids come and recite—some of the groups that they had funded from this area. We did site visits and got to see a mobile dental office, kind of like a bloodmobile, only it's a dental office that goes

to the outlying areas. We saw a library that had gotten some funding for handicapped access, and what they had done with it. We did get to go around and meet some of the people, which was great. I don't know if we're going to do that this visit, but it was a good opportunity to see what Marilyn and Emelie are doing out here.

*What are some of the other locations where you've had the yearly meetings?*

I liked Milwaukee a lot. We went to a Georgia O'Keefe exhibit at the local museum, which was just beautiful. We had a good time at this crazy bar called the Safe House, which was where we went for dinner. It's a place where you have to go in a secret entrance and you have to have a password. It's all sort of James Bond spy stuff, but it was really a lot of fun.

We've taken boat trips on Lake Tahoe. That was a nice one. That was the year we were at Squaw Valley. We had dinner on this sort of paddle-wheeler boat. That was really neat. Boat trips became a big thing for a while. It seemed like every time we went, we went on some kind of dinner cruise. In Washington, D.C., we went on a dinner cruise.

Williamsburg was really neat because we went and ate at all the little old taverns, and we stayed at the Williamsburg Inn, which is beautiful. That was really pretty.

Savannah was pretty. We had time to do one of those tours and see the city, which was beautiful. I don't know if we took a boat trip in Savannah. We went to a Moroccan restaurant that had belly dancers. That was pretty funny.

Colorado Springs was great for me. I know that I pushed to go to that one because I love history. I'm the one in my family who keeps all the old pictures and memorabilia. That's

where John Ben Snow had his ranch for many years when he retired in Colorado Springs. We saw where they used to meet. They met in some gentlemen's club, another good reason women weren't invited, because it was a men-only kind of club. Just to see the history of how it used to be was beautiful. We saw Garden of the Gods. That was Gus and Dana's first meeting. We drove all around Garden of the Gods into some really beautiful places with waterfalls and that was really neat to see.

We try to go places that have some connection. Savannah was kind of a stretch. But my Uncle Bruce lives down south, and so he had a grant down there. I don't know what the stretch was for Savannah, but he was hosting it, so he got to pick Savannah.

Milwaukee's where David's from, so that was the connection there. Syracuse was our sixtieth anniversary, so we wanted to be back up where John Ben was from.

Last year we split into two groups with Grant Committee members on each group, and then we went to all these different places where we had given money. I got to go see Pulaski and see where his cousin, Ralph Snow, lived.

*Was Ralph John Ben's great-nephew?*

It's a weird connection. David and Jonathan would know. Ann would know. But Ralph Snow and he had been on the Foundation for many years.

It's been a fun trip this year. Washington, D.C. was great. We stayed right down by Georgetown and we were able to go see the FDR Memorial, which was really interesting. I saw that with my parents. It has statues of him and you walk through it. It has beautiful fountains. It has bronzes of people in line for bread, showing the bread lines and stuff in the Depression. You see all these tourists standing

in line getting their pictures taken with these bronze life-sized statues.

I had never been to the Vietnam Memorial, and we walked through that. That was really touching. The Korean War Memorial was pretty impressive. Lincoln Memorial—we got a chance to see all that stuff. We did a boat cruise that time. So that was a good one.

It's nice being out West because I've never been out here other than the three or four times we've come out, so it's been really fun doing that too.

*Besides the Grants Committee, what are the other committees that exist?*

I'm on the Compensation Committee. What we do is we look into what other small foundations are doing as far as compensation for their members. We're actually kind of below what the norm is. I think that's a purposeful thing. I think our focus has always been John Ben's wish that his money go towards people who need it and not be spent lavishly by the foundation's board.

Although we do enjoy getting together, we try to keep a lid on it. We could probably do it by conference call, but then we'd never see each other. I think you get a lot more out of face-to-face than you do over the phone. I learned that this year when we didn't go to the Grants Committee—when we did it by phone. You have no idea what the new grants are like and what they're doing. It's a tradition of feeling like a family and feeling like we're doing something to help other people. That's good.

The other committees would be the Financial Committee, which oversees the investments, the Compensation Committee, and the Grants Committee. I think that's about it.

*Who are the current officers?*

David Snow is president. Jonathan Snow is treasurer and, I think, vice president. Emelie is secretary. So those are the officers.

*In terms of the work that the board needs to accomplish, how is that divided up?*

It's handled through the committees. For instance, the site visits are mostly handled by Ann. Jonathan helps out with that because he lives in the area. The Grants Committee winnows it down from a hundred grants to the thirty that we can actually give. That work used to not be done by the committees; it used to be done by the full board, and it took forever. So I think that makes it a lot better. The people we have on the Investment Committee or the Financial Committee are the people who have an investment background. That's why Gus was recruited or nominated for the board and was voted on, so that we'll have that continuing expertise.

Everybody works really well together. There's a good feeling among everybody. There's no, "Oh, no." There doesn't seem to be any of that, so it makes it really fun to come out and see everybody and to do what we do. Those two committees, though, make a big difference.

*Where do you see the Foundation going in the future?*

I think that we'll continue to focus on youth, because I think that's where the future is and I think that's where you've got to give people a helping hand. When you start with youth, some of the grants have shown us that it filters out to their parents and it makes their parents more aware. There have been a lot of literacy grants and things like that where they're giving kids books. Those kinds of things are helping kids from pre-school age

up. Also, helping the disabled—those things will continue.

Journalism will always be a big part of what we do because of our roots with not only John Ben and his connection with the newspapers, but Vernon and his connection with Syracuse University and teaching English. In the future, if our kids are going to have an environment that they can live in, and where they don't have to live under a glass bubble, I think that the environment is going to be something that I'm going to push for so that it is a bigger part of what we do.

*What has it meant for you personally to be able to serve on the board?*

I've learned how to get around airports. Before I came out here, I think the only air flight I'd ever taken was to Florida to visit my grandparents, and that was maybe once or twice. So just getting around and traveling twice a year has been kind of an eye-opener for me. I think I'm in a unique position because I work for a nonprofit. I work for a YMCA, which is a service organization. I'm a program director there, so I make up programs. I don't apply for grants, but our Y has applied for grants—not to the John Ben Snow Foundation—for playground equipment and handicapped accessibility and things like that.

I was on the board of directors of Camp Speers Eljabar, which is a YMCA camp. Board members oversee grants that their staff has written to keep the camp going—for climbing towers and rope courses and things that build character and teamwork in the children, handicapped-accessible cabins and an infirmary that the kids can get into.

It's been like two different sides, and now being on the Grants Committee of the Foundation is the third part of it. It's kind of

a unique, strange, and wonderful situation. From the people who ask for the money, to the people who give the money, and to the people who oversee it. It's been great.

I just cycled off the board at Camp Speers. Our Y is growing when other Ys are struggling. I'm lucky enough to work for a president of our Y who's a real people person. There's always a feeling of building relationships and helping people grow their self-esteem. That's what YMCA work has done for me. The Grants Committee and the Foundation is just another way to help, and it's great. It's just been a really unique opportunity, I think, for me.

*How has the experience of working with David and Jonathan and Ann been?*

A little intimidating at first, because again, I feel that I don't bring to the table the legal background or the financial background that my dad, who I'm the successor to, brought to the Foundation. But I have to remind myself that my background with building relationships and working with people and programming—actually implementing the programs that help people—is what I bring. It's just a different aspect.

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ALLEN MALCOLM

*Alicia Barber: Can you give me a little bit of background on yourself, your family, where you were raised, where you went to school, and what your career has been?*

Allen Malcolm: I'd be happy to. I was born and grew up in Westfield, New Jersey. My father was a lawyer practicing in New York City, and that's really how this connection began. He was John Ben Snow's lawyer and friend, and he was responsible for preparing and having executed John Ben Snow's will, and many other things that he did as a lawyer and friend. That's how, through succession, I got involved with the Snow Foundation and Trust.

I went right into the Navy out of high school, in 1945. I was an aviation cadet and learned to fly. We were training for the invasion of Japan, which, thankfully, didn't come across. When Truman dropped the bomb, they said, "Oh, we don't need you. You can go home." I had two older brothers who served in the Army Air Force during World War II. My father was a lieutenant colonel and

in air intelligence. World War II is a big part of my life.

I got out of the navy, went to Wesleyan University, graduated with a Bachelor of Arts degree in 1950, and went to Cornell Law School, graduating with an LLB in 1953. I started to work in New York City at the Irving Trust Company, One Wall Street, in their Legal Division, and worked there for five or six years.

They began farming the legal work out to the big law firms, so I made a decision to go into the lending area of the bank. I was a lending officer for eighteen years, responsible for our corporate clients in the southeastern states as well as correspondent banking. It was a big thing in those days. Banking has changed so much that I decided to get out in 1983, retiring after thirty years. I ended up in the employee benefit trust department doing work with corporations on their profit and pension plans and that kind of thing.

It was a great career. I enjoyed working in New York, and it's an exciting place still. I go back for a trustees' meeting of the Snow

Family Trust the first Friday in December—nice time to go to New York City.

*I'd love to go back a little more and talk about your childhood and where you grew up.*

My recollections were always good and positive. My family—two older brothers and sister and a younger sister—we always took family vacations at the beach, or New Jersey (they call it “the shore”). I learned a lot of things from my mother in terms of swimming and tennis and sports of that kind. She was an athletic director. Anyhow, it was a good life.

Then, of course, World War II came along in 1942. I was fifteen and went through high school wondering not where I was going to go to college, but what branch of service I would go in. That's the way things were. My older brothers and my father were gone from 1942 to 1945, so I was kind of the head of the house at age fifteen or sixteen. My grandparents came to live with us, but that's ancient history.

After retiring from the Irving Trust Company in 1983, I worked for the Foundation. I had an office in Westfield. I was at that time the executive vice president, secretary-treasurer, and legal counsel, all rolled into one. I was following in my father's footsteps, and that kept me busy. Then my wife and I, when the children were grown, decided to move out of the metropolitan area. We visited with my sister in Chestertown, Maryland, and loved the place. It's a small historic town with the Chester River and a lot of boating, water sports, golf, and everything. It's a town of 5,000 people, with only 18,000 in the whole county—very agricultural. Anyway, I love it there.

My wife died after we were married fifty-three years. She died of liver cancer in 2004. I

remarried a lovely widow in Chestertown and have been very happy the last three years.

*Let's talk a little bit about your father's involvement with drawing up the original paperwork. Can you tell me how he met John Ben Snow and how all of that came to pass?*

It was through the law firm that he worked for in New York City. I think it was called Talbert, Noonan and Patterson. Noonan had been a former director of the Internal Revenue Service, I guess, and my father was primarily a tax lawyer. The Irving Trust Company was John Ben Snow's bank, incidentally, but that had nothing to do with my job there. Anyway, I think it was through the law firm, and then he broke away from that firm and had his own practice. He practiced primarily for John Ben Snow, F.W. Woolworth, Norman Woolworth's family—Norman and Bobby Woolworth and their two children, Norman Junior and Pam, I think their names were...and Freddy Woolworth. There were three of them. That was his practice.

Some people used to say, “How come you didn't go to work for your father when you got out of law school?”

I said, “That wouldn't have been a good idea for either one of us.” [laughs] To the best of my recollection, that's how he got involved with John Ben Snow.

John Ben Snow had an apartment in the Waldorf Towers. He maintained his New York State residency, even though he bought a ranch in Colorado Springs and he lived there for a good part of the year. He loved to ride horses.

*What can you tell me about John Ben Snow and some of those early figures in the Trust?*

I'm probably the only one who knew him personally. I started in about 1967 but



I may have gone to a few meetings before that. I became the assistant treasurer of the Foundation in 1967, so that's more than forty years ago. For the first meetings I remember back in the sixties, of course, John Ben Snow was in charge, and there was no doubt about that. He had a distant relative who he discovered, named Ralph Snow, and he got Ralph Snow into the Foundation. I think another man was Harry Bunker, who was an associate in Colorado Springs, and my father. We met in the Mining and Exchange Building in Colorado Springs. That was where John Ben Snow's office was. The whole meeting only lasted probably about two hours.

There wasn't a lot of investment. The original donation that John Ben made when the Foundation was established in 1948 was a New York State not-for-profit, and my father, I believe, did most of the work in getting that charter as a not-for-profit corporation. John Ben Snow was the chairman of the board. I think my father was vice president and treasurer, and Harry Bunker, I don't know. The securities were just held in a safe deposit box. There was no broker or investment advisor or anything. We sat around and talked about what we might buy or what we might sell. It was very informal.

It wasn't too long after that when I suggested that instead of keeping the stocks in a safe deposit box, they put it in an investment account at the Irving Trust Company, which they did. Robert (Bob) Scott was the first vice president of Irving in the Trust Department that handled the account. He was a really nice man and very capable. But he wasn't there originally. Originally, there were just four or five of us.

After the meeting, we'd go to the El Paso Club for lunch. John Ben was a member there, and he had a favorite wine that they kept for him. I can't recall what it was, I think it was a

white wine, and he very proudly served that. I think the El Paso Club is still there today, and, of course, out-of-towners. As a matter of fact, John Ben Snow, I think at that time before he bought the ranch, lived in the old Antlers Hotel. There's a new one there now, but John Ben Snow lived in the old one. He had the ranch, and he had thoroughbred cattle and quarter horses on the ranch, but he didn't live there, really. He went out and rode. He and his riding buddies, Harry Bunker and the rest of them, took trail rides.

That was the routine for the first five or six years that I was involved with the Foundation, and it was fun. There were no women involved. John Ben had a secretary named Beryl Eaton, and it wasn't until many years later that Lorita Bunker entertained the Foundation members when they came to Colorado. We always had the meeting in Colorado Springs around the fifteenth of June because that was John Ben Snow's birthday.

*What triggered the change where women were added to the board, and do you have any idea why it didn't happen at an earlier time?*

Well, John Ben Snow was uncomfortable in the presence of women. He was of short stature; I think he was about five-foot-six. He never married. He was definitely a man's man. I don't mean that he was gay or anything like that. [laughs] I think he just felt uncomfortable in the presence of women. Maybe he would have rolled over in his grave if he knew there were women on the board now, but I don't think so. He was conservative, but not biased in any way. I don't think he had any racial or gender problems; it was just that his friends were mostly men.

*Do you know who the first woman on the board was?*

That's a good question, but I can't exactly recall. It wasn't until many years later. It wasn't until after John Ben Snow died, I'm sure of that. He died in January 1973, and that's when the Trust started, because the Trust was established under his will. As a matter of fact, before he died, my father's health was ailing, and John Ben Snow wanted a codicil to his will. My father prepared it, and I took it out to Colorado Springs. John Ben Snow was in the hospital at the time, and I took it out and read it to him, and he agreed to it. I got him to properly execute the codicil to his will. I don't know exactly what the date of that was, but it was probably in the early seventies.

Then at his funeral, again, my father was too ill to come out, so I came out and I gave the eulogy, which I still may have a pencil copy of. I talked about meeting him, and his character. People came up to me afterwards and thought I was a minister or something. I don't know if you know anything about the Masons organization. My father was a Mason, as were my brother and I. I went all through the chairs and was the master of the lodge. When you go through, you start as a chaplain. So I took some of the Masonic things, which are very religious, and I put them into that eulogy. I guess that's what made people think I was a minister. I was proud to have the opportunity to do it and really to represent my father in that regard.

*Was John Ben Snow a religious man?*

Yes, I'd say he was. I don't know that he went to church a lot, but I think he was religious in his beliefs and in his faith. He didn't make a show of it.

*So you served on the board of the Foundation and then the Trust was established later by the will?*

Oh, yes. You have to understand the differences between the John Ben Snow Foundation and the Trust. The Foundation was incorporated as a nonprofit in the State of New York in 1948 with a contribution from John Ben of two million dollars. Over the years, it increased in value to about eight million in 2006, and it's now about six million.

Foundations, under the tax laws, are required to distribute 5 percent of their invested income, so if you had—this is hypothetical—a market value of your invested assets of eight million dollars, you had to distribute, say, 5 percent of that.

Well, Congress was having an investigation of private foundations' abuses and things of that kind, and they talked seriously about increasing that from 5 percent to 6 percent or even more. I remember very well somewhere around 1968-69 at the annual meeting John Ben Snow and the rest of the people there talked seriously about liquidating the Foundation, taking all the assets and giving them away because of the tax burden. He was a shrewd man, so far as his investments and his knowledge, but he didn't want the government to take his money. Fortunately, Congress backed off of that. That was a point when the Foundation almost would have been liquidated and then would no longer exist. But it didn't happen, thank goodness.

*The Foundation was founded in 1948 as a nonprofit in New York. What was its goal at that time? What types of grants were given by the Foundation?*

John Ben Snow, as you know, grew up in Pulaski, New York, and it's a depressed economic area even today. He told me once that he got tired of eating the rotten apples. They had an apple orchard and they made applesauce. The good apples were sold, but



the family had to make applesauce out of the rotten apples or something.

When he established the Foundation, he wanted its basic mission to be to improve the quality of life of the people in the village of Pulaski, New York. That's when he met with Ralph Snow, this distant relative. Ralph had been a Bible salesman in the Midwest or something and very much a Fundamentalist. He said to Ralph, "I want to know what's going on in Pulaski. I will buy you a house, and you live in Pulaski," which he and his wife Mary did. He said, "I want you to report to me what's going on there so that we can make appropriate grants." That's what Ralph did. I'm sure he wandered around town, and he was probably a bother at the construction of the new library and municipal building, which the Foundation made a major grant for. It's still there today. The Snow Foundation helps maintain that building with an annual grant. It is now municipal offices and the library.

Ralph was kind of the overseer of other things that were going on there. He would come to the meeting and he would talk about what was going on in Pulaski. Sometimes he would talk a little too much, and John Ben Snow would give him the sign, "Okay, that's enough, Ralph. Let's get on to something else." He did that for quite a few years. I don't know when he established that, but it was in the sixties, probably.

That was the purpose of the Foundation, and we made grants for many things in Pulaski, and we still do. It came to the point though, where we had done so much for that little village. We had the new library and office building, a municipal building, and a new firehouse. You could go on and on, with what we did. We did just about everything but pave the streets with gold. [laughs] We didn't do that. We didn't do a sewer system either, and I think they wanted us to do something.

I remember we said, "We're not going to do that."

As the Foundation's assets grew from two million to eight million, and we had more money to distribute, we began to feel that we just couldn't pump all this money into Pulaski. So the geographical sphere of influence for the John Ben Snow Foundation expanded from the village of Pulaski to upstate New York.

We did make some grants in New York City, too, for a while. The Lincoln Center grant goes way back, and some others, but primarily it was for upstate New York. We started making grants in Oswego County and Syracuse and Rochester and other parts of upstate New York, and we do today.

*What year did you start serving on the board?*

I think it was '67.

*What was the reason that you started serving on the board?*

Well, honestly, I think they wanted to get some young blood in there. [laughs] I mean, John was in his late seventies. My father was a couple years younger. Harry Bunker passed on, and then there was Bill Fike from the Irving Trust Company who was on the board. George Murphy, who was chairman of Irving Trust, was on the board for a while. They were all a lot older. I was in my thirties and I had a legal background. I had the banking background. As I said, I got them to put the assets into an investment account at the Irving Trust Company in the Trust Department there, and they did a very good job. Irving Trust Company had it for many, many years.

*Did you serve on the board with your father or did you replace him on the board?*

I served with him. Originally, I was assistant treasurer or assistant secretary, which meant I had to sign some things. So I was kind of helping, backing up my father, who was secretary and treasurer. I was his assistant, you might say.

I think it was around '74, when we were meeting in New York City, when my father and mother were held up at gunpoint in their house and robbed, and he never showed up at the meeting. Later I found out why. At that point, the directors and officers of the Foundation decided it was time to move on. This was after John Ben Snow died, so my father was actually president of the Foundation. He died in 1976, but about two years before that, his health was not good, and that's when Vernon Snow became president. I kind of took over as executive vice president, secretary-treasurer and legal counsel. Vernon and I worked very closely together for many years because that's all there was, really. There was nobody else who had the time or experience to do those things for the Foundation, so that was the management—Vernon and me. [laughs]

*Were there really clear divisions of duties of the board members from the time you joined the board?*

Yes. As I said, Vernon was the president, and because he lived in Syracuse, he was primarily responsible for the grants. My duties were more in the legal and financial end. I took care of filing the tax returns. I took care of all the other things that needed to be done and kind of monitored the investments. I worked on the grants, too, and Vernon did some of the other things, so the two of us worked very closely together. It was a great relationship and a good combination, I felt, and we became very good friends.

*You said that the Trust was established in 1973 through John Ben Snow's will?*

The John Ben Snow Memorial Trust was established as a charitable trust under his will, and so it didn't become effective until he died in January of '73. Then we had to go through the estate and everything, and that took a couple years. So the Trust really didn't get started and funded until 1975.

*What was the purpose of the Trust?*

I think some people would say, "Why didn't he put all his money in the Foundation?" He could have, but I think that experience back in the sixties when Congress was going after private foundations deterred him from doing that, because he thought, "Well if the politicians get into it and get their hands on this thing..." A charitable trust established under a will is much harder to reach, because even the courts don't want to upset a will. So it was very carefully considered.

As far as directing where the grants would go, it was pretty much under the statutes at that time that it was established for contributions for religious and charitable organizations. That is the literal purpose of the section of the Internal Revenue Code, which is called 501(C)(3). The conditions in the memorial trust for making grants were quite broad, and there were no geographical limitations either. Even in the Foundation, it was not written anywhere that the grants would go primarily to the village of Pulaski or upstate New York, but we all knew that that was his wish that he had expressed, at least those of us that had been on the board before.

*His wish was to expand it, or to keep it in Pulaski?*

He wished primarily to benefit and improve the quality of life of the people of Pulaski. But as I say, we outgrew that, and the geographical area of grant making had to expand. In the Trust, there were no geographical limitations, and the three trustees who he named primarily represented his three areas of interest.

The first was his friends, the newspaper, and the magazine. He founded a magazine called *Western Horseman*. Despite all the newspapers, he was chairman of the board of the Speidel newspapers at one time, and Rollie Melton then became president, and who else? Chick Stout, he was on the board of the Foundation. He was one of the early members.

Chick was, I believe, pretty much a self-made man, and a good leader. I remember him as kind of being a second-guesser as to the investment policies. "Well, if we had bought this instead of that. If we had sold this instead of that, we would have..." But that's hindsight. He was a good man, and of course he was a very good friend of John Ben Snow, so he knew what he wanted. He didn't always go along with the rest of the crowd. He was his own person, his own thinker, and so that was all right. It's good to have diversity on the board, I think. That's what we have now, too.

One trustee was representing his newspaper interests, one was the family trustee, and one was representing the legal end of it. The original three trustees were Ralph Snow; my father, Talbot Malcolm; and I'm trying to think whether the third was Chick Stout. In the will, the three original trustees had the power to appoint their successors. So that's how my father appointed me. He died in 1976, so I became a trustee. The Trust had just been started in 1975. Ralph Snow was still alive then, so there was me and Ralph Snow. There was another man, I can't

remember his name, who was involved with the newspapers.

Another man on the board of the Foundation was named Bill Ellwood. Bill Ellwood was an attorney in Iowa. I think Ames, Iowa. A branch of Speidel newspapers was in Iowa as well, and that's how Bill Ellwood got involved, through the Speidel party. He was on the Foundation for a number of years.

*With the running of these two separate organizations, the Trust always was just run by three trustees, whereas the Foundation had a board, is that right?*

That's right. They're a different structure. The Foundation has a corporate structure with officers, a president, and directors. Unlike other corporations though, there are no stockholders. It's what's called a not-for-profit corporation, but it is incorporated.

The Trust is just run by the three trustees in accordance with the terms of the will. The trustees are bound by the terms of the will. The charitable contributions made by the Trust were very broad. The only thing you can't do is make grants to individuals. It has to be a nonprofit organization that qualifies under the IRS Section 501(C)(3). Other than that, the trustees use their own judgment. We have always followed a policy that if one the three trustees doesn't agree with a grant proposal, we don't do it. It's always been unanimous.

This goes back to the prior trustees as well, but I've been in since the beginning, really. Vernon Snow followed Ralph Snow as trustee, and now Jonathan [Snow] has followed his father, Vernon. On the other side, I'm trying to think whether the original trustee was Chick Stout, and then maybe there was another guy in between. I'm not sure of that.

Rollie Melton became the trustee representing the Speidel group of people, which later sold into Gannett, then being part of Gannett. Then Rollie appointed his daughter, Emilie.

*Have the trustees always served on the board of the Foundation? Is there an overlap there?*

Yes, there's an intermarriage, you might say. It's not required, but the trustees have, for the most part, been either officers or directors of the Foundation. Since 1975, when the Trust really got started, we have had our meetings jointly. Prior to that, because there was no Trust, the Foundation officers and directors met by themselves. I was describing earlier how we met in the early days in Colorado Springs.

After John Ben Snow died, we started moving the Foundation's annual meetings to Syracuse. We met in New York City for many years until it got too expensive. We've moved it around through the years to areas of interest. We had a couple of meetings in Santa Fe, San Francisco, and Milwaukee. That's where David Snow lives. We've had one in New Jersey. We move it around, but we don't go to fancy resorts.

*Do the Trust and Foundation actually sit in the same meetings, or do they have separate meetings?*

We have entirely separate meetings, because the objectives are slightly different. It's nice, though, to have the flexibility of the three trustees being on the Foundation board, because there have been occasions that I recall when a very worthwhile grant proposal would come up and it might be larger than the Foundation would want to handle. The Foundation at that time was roughly eight million and the Trust was thirty million.

The Trust had more money to distribute for charitable purposes than the Foundation, so sometimes we'd move a grant proposal from the Foundation to the Trust, or if the Trust got a grant proposal from some upstate charitable organization, we might say, "Well, let's refer this to the Foundation." The flexibility is good, I think.

*When the mission expanded beyond the focus on Pulaski, it just went to New York State, right?*

Yes. I'd say that happened probably in the eighties or mid eighties. We got to the point where we really couldn't keep pumping money into Pulaski. We did some innovative things, though. We got the village of Pulaski to establish a community foundation. It was very small, but we got it started. We kind of nursed it along and got the big community foundation in Syracuse to give them some management expertise. We put money in to a certain extent, and then we did some matching grants with them. We said, "We'll put in \$5,000 if you can raise \$5,000 locally." It took a while, but they're finally doing a pretty good job. That was a good thing and it happened not too long ago. I'd say that happened in the early nineties.

*I understand there was a change in the management of the Foundation's and Trust's assets in 1997. Can you tell me about that?*

Yes. That was primarily because of the Irving Trust Company, which I had described as John Ben Snow's bank. They had the invested assets of the Foundation for many years, but they merged. Within the banking system, there were mergers going on all over the place, and they merged with the Bank of New York, which is, again, a good

organization, but we didn't feel the closeness there. They hadn't done a good job, either.

We hired a consultant to look at the investment, and we decided to divide it up and take it away from the Bank of New York and give it to other managers, one of which is a very particular manager that works almost exclusively with small private foundations—TIF. They're located in Charlottesville, Virginia, and have moved to Pennsylvania somewhere. They have four or five funds, like mutual funds, that small private foundations can put their money with at a more reasonable rate than you could expect from a Bears Stearns or Goldman Sachs or somebody like that. So we put money there, and we put some money with Merrill Lynch.

Then Jonathan became friendly and knew of an insurance person in Syracuse who was connected with Northwestern Mutual Insurance, and he got us into America Funds Growth Fund A, so we put some money in with them.

The fourth one came out of the relationship with the Irving Trust Company. A young man by the name of Drew Rankin had been an investment manager at the Irving Trust Company, and I knew him personally. He had left before the merger with Bank of New York and gone with a private firm called Tocqueville. Drew was very good and had a specialized type of investment management, primarily what we would call value securities. We were impressed with his presentations when he was with the Irving, and we thought, "Well, let's put some money with him." He's been the best manager we've had over the period. It didn't do too well in the last couple of years, but nobody did. So now we have four. The Trust assets are still managed by Bank of New York, Irving Trust Company, because John Ben Snow's will that established the memorial trust, in addition

to the three named trustees, established what was called a corporate trustee, and the corporate trustee was the Irving Trust Company. So there were three individual trustees and a corporate trustee in the Trust. Because of that relationship and the fact that Irving Trust, now Bank of New York, would get a fee anyway for being the corporate trustee, it didn't seem to make a lot of sense to take the investment and management away from them and pay a fee in addition to that. The Bank of New York now has focused more on this type of service through the merge. They've merged with Mellon Bank in Pittsburgh, so they've done a pretty good job for us, I'd say.

Two officers of The Bank of New York/Mellon are coming out tomorrow, and the one man is a trust officer. He does all the recordkeeping. The other man is an investment manager, and he works with another group, a large group of investment managers under the Bank of New York/Mellon, but he's our guy. They're coming out and he'll make a presentation to the trustees and their successors. When the Trust meets, the three trustees are there and their three successor trustees are there.

*Every time?*

Most every time. I don't think we've missed much. We think it's a good thing to do that so that the successor trustees know what's going on and if something happens, they can fill in.

*Who are the successor trustees now?*

Jonathan was Vernon's, his father's, successor, I was my father's successor. I have appointed my daughter, Valerie MacFie, as my successor. She works for a nonprofit. She's



the aquatic director at the Monmouth County YWCA in New Jersey. I have four children, but I think I did the right thing in appointing Valerie, because she's the right person for the job. Valerie's been on the board now for six or seven years.

Emilie has appointed her mother, Marilyn Melton. Jonathan, since he has no siblings and his children are still much too young, appointed his cousin, David Snow, as his successor trustee. David has been president of the Foundation for the last seven years, and he'll be stepping down this year because the bylaws of the Foundation say you can't hold the same officer title for more than seven years. I was president for seven years and I had to step down. Rollie became president, and was president for two years and then died, so I stepped back in as an interim president for a while until the next annual meeting, and David was elected.

The officers and directors of the Snow Foundation are elected. The officers are elected by the directors. The directors really have the power to do most everything in the Foundation. The trustees are named until they resign or die, and then their successors come in.

I don't know whether you may know, but the Trust has a limited duration. Under the New York State trust law, you cannot have a trust in perpetuity. If you establish a trust, at the time the trust is established, you have to name two people. At the end of those two people's lives, when the last one dies, the trust has to be liquidated.

As the two people that were named, I think Jonathan was one of them. He was an infant at the time and I don't recall who the other one is. I think it's a relative of David's. Anyway, they're both Snows. So the Trust will probably exist for another fifty years.

*Then it gets liquidated and what happens? What does that mean?*

Well, whatever the trustees decide. I think what would logically happen is that the Trust would be liquidated into the Foundation. That makes sense to me, because the Foundation, being a corporate entity, can be perpetual. The Trust cannot. They could decide to just make grants and give it all away. But I hope that at that time whoever the trustees are will decide to put that money into the Foundation, which would be perfectly legal. It would be a charitable deduction, or a charitable grant to the Foundation, which is a 501(c)(3) organization.

*When you first joined the board of the Foundation, what kinds of grants were being given out and to what areas?*

Well, I think as I mentioned, the focus was almost entirely on the village of Pulaski, New York, in Oswego County, where John Ben Snow grew up. I don't know whether he had a little sense of guilt for going away from there and making a fortune, but he felt strongly that he wanted to improve the quality of life of the people in Pulaski. Initially, grants were made almost exclusively to projects in the village of Pulaski.

Ralph Snow was the designated watchdog, and John Ben Snow gave him a very nice house and paid all the expenses so that Ralph could be there and keep an eye on things in Pulaski. From the time I went on in the middle to late sixties through, I would say, the eighties, the grants were almost entirely for Pulaski, and the biggest one was for the municipal building and the library. Today the Snow Foundation still makes a grant to the village of Pulaski for the maintenance on

that building. We did a lot of other things, including a clinic of some kind, a fire station, and an ice skating rink. It goes on and on.

Eventually it got to the point where the Foundation's assets had increased in value so they had more money to distribute, and the needs of the people in the village had been pretty much taken care of. So the geographical area was expanded to include what is referred to as upstate New York. Now, there are no strict boundaries to upstate New York, but generally speaking, it includes everything from Albany across to Binghamton, Rochester, and Buffalo. Syracuse has been a big benefactor, so a lot of the grants from the Foundation as well as from the Trust go to the Syracuse area today. That was the focus and it worked very well. I think John Ben Snow would have been pleased by many of things we did to help the people in Pulaski.

*What are some of the memorable grants that you recall after the geographical area was expanded?*

The names don't always come to me, but there was a home for disabled young people somewhere in upstate New York. I was not directly involved in the decisions of the grants. I approved the grants, but it was Vernon who really developed the grant-making procedures, and since that he lived up there, he knew the area. We made a number of grants to Syracuse University. In the surrounding area, Utica, we got involved quite substantially. I've been involved more directly with this one.

In Cooperstown, New York, there's not just the Baseball Hall of Fame; the headquarters of the New York State Historical Association is there. In connection with that there is a graduate school of museum studies

called the Cooperstown Graduate Program, and they train and provide a graduate degree for people who are going to be curators or a start out working in museums. Some of them have been in the Metropolitan Museum in New York. I ran into a graduate of that school down in Columbia, South Carolina, who was the head of the museum there.

We have been providing fellowships there for quite a few years. In one of the most interesting situations that I can recall, we had already given the money for the fellowships for the year when I got a call from the executive director there, a marvelous woman by the name of Gretchen Sorren, who said, "There's a young man from Romania who wants to come to our graduate school. He worked for a museum in Romania. He doesn't speak much English, but he needs financial support."

So the trustees agreed to make a \$10,000 grant. We couldn't give the money to him, but we gave it to the Cooperstown Graduate Program to pay for his expenses—his tuition and his lodging and so forth. It's a two-year graduate program with very small facilities. I think they do a marvelous job.

He graduated and went to work in a museum in Nantucket, and then the next thing I heard, he was bringing his wife over. I have some of the most fantastic letters from this young man, about how grateful he is to have had the opportunity to come to America and go to this graduate school. Then he and his wife became U.S. citizens. I think it's just a marvelous story of a young man's ambition and the fact that we were able to help him get started. I feel very good about that.

*Are any of the grants, like the one you mentioned, given for multiple years or do you just decide every year what to give?*



We don't like to make commitments for more than one year, or sometimes two years, because it ties up the money. If somebody wants to do something for an extended period of time, we say, "We'll look at it each year." That's what we've been doing with Cooperstown. We haven't made any long-term commitment to them, but they come back every year. I'm going to work with Gretchen to see if we can establish something like we did with the New York Law School. The Trust made scholarship grants to New York Law School in Manhattan for many years. It started out at \$25,000. Then it got to be \$50,000. Then they wanted \$75,000.

We also were making scholarship grants to New York University, because John Ben Snow went to New York University. We found we had \$250,000 tied up in scholarship programs, which were good. With the New York Law School, we said, "Over a period of years, many of your students have gotten tuition scholarships from the John Ben Snow Memorial Trust. Let's see if they're willing to give something back. You have the names of the graduates who got Snow scholarships. You write and tell them that the Snow Memorial Trust will match dollar for dollar what they put in." The first year they didn't even make \$5,000, but it grew and it grew. It got to be more than \$10,000 and then \$20,000. That fund grew in a space of, I'd say, about six or seven years, to about \$235,000 from graduates who had gotten Snow scholarships.

So with that, we stopped making the \$75,000 scholarship grants because we had provided them with the money to produce. I want to do the same thing with the graduate school. We've been doing it for fifteen years, so they've got a lot of graduates. Of course, they're not doing as well as lawyers. In that field you don't get paid big bucks, but I think it might work.

*What year did that matching funds agreement begin with New York Law School?*

We got involved in that through one of the lawyers. I'm trying to think of his name. It wasn't Joe Mitchell. Our involvement with NYU, of course, results from John Ben Snow himself. Before he died, before the Trust was established, the John Ben Snow Foundation gave money for a dining room at NYU School of Business, which is still there today, called the John Ben Snow Dining Room. We had scholarships there, as I say, and we paid our way out of those things.

What we did is we called a moratorium on grants for a couple of years, and we gave about \$250,000 to NYU Law School. They wanted us to give them a million to create an endowment. We said, "We'll give you a quarter of a million, but that's it." [laughs] So we actually paid our way out of those scholarship programs. With the graduate school and Cooperstown, I'm hoping we can kind of do the same thing there. It will take some time.

*How has the decision-making process for the grants evolved?*

The Foundation has what's called a Grants Committee. This is new. When I was first involved with it, when we met with John Ben and Ralph Snow, Ralph would come up with these ideas and we'd talk about them. John Ben Snow, most of the time, said, "Okay, we'll go along pretty much with what Ralph said." That's the way it was done initially in my first few years on the Foundation.

When Vernon became president, Ann came into the picture, I don't know exactly when she came in, but she helped Vernon, and they created the grant proposals. Vernon and I got together and talked about them, and

then they were presented in a very formal way to the directors at the annual meeting.

We only made our grants once a year, both in the Foundation and the Trust, and some of the grant seekers don't understand that. They say, "Why can't you give us a grant tomorrow?"

I say, "Well, because we don't do that. We only meet once a year," because of the geographical separation. On the board we've got people from Reno, we've got Milwaukee, Wisconsin, and we've got people from Syracuse. We had one guy for a while from South Carolina. Now we have people in Maryland instead of New Jersey.

So we only make our grants once a year, and they're presented in a formal way at the annual meetings, and all the directors vote on them. I don't recall, but maybe once or twice in all the years I've been on, we've had a grant proposal that was recommended but not funded. We had one that Ralph recommended, which we shot down. It was something about science, and the guy made lightning come out of his fingertips or something. I don't know. [laughs] It was some kind of a religious thing, too—science and religion. It was off the wall. That's the only one I remember we turned down that Ralph came up with.

Sometimes John Ben Snow himself, if he didn't like it, would just say no, and that was it. If he said no, that was it. Today we all vote on the grants as they're presented, each one, in the Trust. If you want to get into that, we do it a little differently because there are just the three of us and we're in three entirely different geographical areas. I was in Syracuse and now Maryland, but I was in New Jersey and the New York City area for a long time.

Each of the three trustees in their area developed grant proposals because of people they know and because of interests they have. It's kind of a good thing we have the

diversity, because we all don't have the same interests. Emilie may be more interested in the arts. We have different interests. For a long time we went into helping the disabled when the Americans with Disabilities Act came into effect, and a lot of nonprofits didn't have the money to put in escalators or ramps, or change their bathroom facilities to accommodate people in wheelchairs. We did a lot of grants in that area.

Emilie developed some and Jonathan developed some and I developed some. We all, in our areas, receive grant inquiries, and if they meet our funding criteria, we then send them a grant application form. Then we have certain deadlines as to time. In order to function at our annual meeting, we have to have them pretty well consolidated by the time the end of May rolls around. Then Vernon and Emilie, and it used to be Rollie, and I get together in a conference room and we go through them.

I had so many this year that I had to turn down. It was very agonizing. I hate to turn them down. But we just didn't have the resources to fund them all, and hardly anybody gets what they ask for. If they ask for \$25,000, they might get \$20,000 in a good year.

*Are the three of you in the Trust then each responsible for an equal amount of money?*

Yes.

*So you just divide it that way but you all come to agreement about who should get the funds?*

About the grants, yes. If one of us doesn't, for some reason, we don't do it. It has to be unanimous or it doesn't go through.

The corporate trustee, Ken Halprin, the vice president in the Trust Department of

the Bank of New York, provides us with the numbers—the required distribution. It's a lot more complicated, but simply put, it's 5 percent of the market value of your listed assets, less a number of deductions and so forth. So usually by the middle of May we know how much money we have in total to distribute, and then we divide that three ways.

*You talked a little about the grantees or potential grantees having to fulfill certain requirements. Have those changed over time?*

A little bit. I think initially things were pretty loose, but we've become much more professional in the last twenty years, and we have some pretty clear guidelines as to the grant application procedures. We like to get, first, a letter of inquiry by the first of January, and then a complete grant proposal. We require audited financial statements. We didn't do that in the past. We require budgets for the project and usually the organization's annual budget. We didn't get those in the past, either. We now get the Executive summary, which we didn't do before. Some of these potential grantees, they go on. I mean, if they send me one that's too thick, forget it. That goes in the reject pile. [laughs]

*So they can be an inch thick?*

Yes. They are sometimes. They send you too much stuff. We require a name and occupation of their board of directors. You can learn from that. I don't do as much as I'd like to; I like to do site visits. I want to go see the people. I want to see their housekeeping, so to speak. I want to see them, how they operate in their own backyard. That was what I did when I was a lending officer. Another thing I do, perhaps more than the others, because I've had so much experience, is I study the

financials pretty carefully and I look to see whether they have an operating deficit. Not-for-profit means that they're not supposed to make a lot of money, but you're not supposed to lose a lot either, and, unfortunately, many nonprofits operate at a deficit. If they didn't have support from the public in the area of grants or contributions, they wouldn't be able to do what they're supposed to do.

So, yes, we have changed our procedures a good deal. It's much more professional.

*The trustees, the three of you, tend to take proposals from your geographical area, so that would make it easier to visit the sites, I suppose.*

Yes, it is. When I lived in New Jersey, most of my grantee proposals came from organizations in New Jersey. Now, since I've been in Maryland for ten years, I'm getting a lot of them from the Baltimore area, from Washington, D.C., and the Eastern Shore of Maryland. I get some from South Carolina. I get some from Florida. It depends on where your contacts are, and I've been around longer than the other two, so my contacts are probably broader and more diversified. I notice Emilie's grants are almost entirely right here in Reno, because her experience isn't as broad and the people she knows are here.

*What would you say is the breakdown between solicited and unsolicited proposals for the Trust?*

Well, we don't go around beating the bushes for grant proposals. We don't have to anymore. Initially, Vernon, for the Foundation and for the Trust, developed his contacts in the Syracuse area and upstate New York. He would talk to people and say, "You've got a good organization. You're doing worthwhile things. Why don't you submit a grant

proposal?” I don’t think I’ve ever had to do very much of that. I moved to Chestertown and I still don’t have a listed telephone number. I mean, there’s no John Ben Snow Foundation or Trust listed in the telephone book, but you’d be surprised how fast word gets around when you make one grant to an organization in Baltimore. Kennedy Krieger Institute is one that I have funded several times.

*What is that?*

They’re right next to Johns Hopkins University and Hospital, and they do a lot of work with autistic kids—educational programs and assistance programs for kids with autism. Other ones in Baltimore include Living Classrooms, which works with the public school system to provide education and self-improvement/self-esteem type of activities for kids from broken homes and low-income families. I like to do things for children through youth grants, and for those with disabilities.

*Do you feel like the emphasis of the grants that have been given from the Foundation or the Trust has changed over time? Have things changed based on how society has changed, too?*

Yes. The needs change over time. The Foundation’s been in existence now for sixty years. I mean, things do change. Society changes. Needs change. Federal funding changes. We had the Reagan administration, which was in favor of small government, and now we’ve got an entirely different type of government who wants to spend money on everything. The economic situation today has made it difficult for nonprofits, as well as for us. It reduced our ability to make more grants.

The emphasis, I guess, has always been, both in the Foundation and the Trust, on education. I described the scholarship grants we’ve made to New York University and New York Law School and others. We’ve made grants in upstate New York to Clarkson University, Cornell University, and Syracuse University. I’d say probably today about 60 to 65 percent of our grants are for education in one form or another. It might be higher education. We’re doing some funding for the village of Pulaski, still, for scholarships for high school kids.

*For them to attend college anywhere?*

They can go anywhere, but they only get so much money. [laughs] It’s not an open-ended thing.

We’ve done grants for education in the arts. I would consider Lincoln Center Institute an educational grant because they go into the public school system with artists, dramatists, ballerinas, and all that. They made a movie out of it. It’s about a guy who takes ballroom dancing into the public school system in New York. I don’t know what the name of it was, but it was great.

Anyhow, those kinds of things I consider education. We’ve done some youth programs and we’ve done some programs in the area of journalism, which you can consider education. So if you put all the areas into a category of education, it’s probably averaged about 65 percent.

*That’s for the Foundation and the Trust, as a whole?*

Yes, I think the whole thing. Years ago, probably it was more like 80 percent, because we’ve diversified more. We’ve gotten into environmental grants. We have about

seven different categories, both from the Foundation and the Trust, like arts and culture. We have one called Community Initiatives, and that might be volunteer groups that help senior citizens get to their doctors' appointments. Community Initiatives can be a number of different things, but it's mostly that kind of stuff. Education is the biggest one still, in both the Trust and the Foundation. We have environmental grants and some journalism grants and youth programs. We have the disabilities category, which would cover physical and mental disabilities for children as well as adults.

*You said now there's a website that's devoted to soliciting proposals.*

Yes. Jonathan did that.

*So that's relatively recent, is it?*

Yes. We used to publish an annual report that was a fold-up thing. It had some information about John Ben Snow and his life, and then it had a section on grant application procedures and reporting responsibilities and the names of the three trustees, and then a listing of the grants we had made that year. For the Foundation, the annual report had a brief financial statement discussing what the assets were, what the taxes were, and so forth. Last year though, Jonathan put them on the website so we didn't really publish an annual report anymore, which he'd send me a copy of. I used to give it to people who inquired, "What does the Snow Foundation do?" or, "What does the Snow Trust do?" I could reply, "Oh, here's an annual report. It tells you."

*Was it ever sent to anyone in advance? Was that a way of soliciting proposals?*

Yes. If I had an inquiry, either in writing or over the phone, I sent them the annual report, and said, "Here's what we do. Here's how we do it. Here's what the procedures are for submitting a grant application." I never make any commitments, but I would just say, "We'll be glad to review and consider it at the next annual meeting." Sometimes you run into a situation where you get a request to be funded right away, and you can't do that if you only meet once a year.

I forgot to mention one of the things that I think has done great over the years. We've been funding the Colonial Williamsburg Foundation in Williamsburg, Virginia. This started in 1986 or '87, when there was the Bicentennial of the Constitution. Vernon was a professor of history, and his forte was constitutional history and parliamentary history, so he was asked to be something like an adjunct professor at NYU that year on the Constitution.

I don't know who it was through, but Colonial Williamsburg was doing a Teachers Institute on the Constitution, and they would bring high school teachers from the upstate New York area, Albany and Syracuse and so forth, to Williamsburg and give them a hands-on week of education on how to teach early American history. It included the Constitution of the United States. We did that for two years. They were large grants. I think the first one was \$157,000, and they sent twenty-five teachers down. They developed educational materials and they took them back to their classrooms and tried them out.

Then they came back in the summer or some other time, and they got together just for a day or two to determine what worked and what didn't work. Then they put all this into printed volumes and distributed them to libraries around the country. We did that for two years. That was one of the greatest



things we ever did. I'm a history buff, I guess. I majored in history in college, and I think I've been to every Civil War battlefield of the South. I'm currently reading three books, all on different phases of history.

We have continued doing that now for teachers from different areas. We just sent some teachers from Reno a couple years ago to Williamsburg for this weekly session—also teachers from Wisconsin. We've done New York State. We've done New Jersey, Maryland, and South Carolina. We're doing South Carolina this year and next year. South Carolina probably has the lowest rated public education system in the country, close to it. They just ate this up. They thought it was wonderful. Even in the more sophisticated, affluent regions, the teachers thought it was the greatest thing ever. I've gotten so many letters from teachers all over the country about how thrilled they were to attend this session and how much it meant to them. It has a ripple effect, because they go back and they teach, and all the kids learn more.

I think our school system has neglected the teaching of American history. Kids don't know today who James Madison was. I think most of them have no conception of how this country was founded and the sacrifices that the people went through to get independence and form a government. I think it's important.

So we're still doing those Teachers Institutes. We do it every other year, and it's been a great thing. I think it has a great effect. That's one of my pets. I love Williamsburg. I love to go there. We used to have our annual meetings there. A couple times we met there.

In our little town where I live now, we just celebrated our 300<sup>th</sup> anniversary. It was founded in 1707, and we're doing a lot of early American history in our area from the settling of Jamestown in 1607. That was

a 400-year celebration. In the shipyard in Chestertown, where I live, they built a replica of an eighteenth-century sailing schooner that patrolled the Chesapeake Bay for pirates and smugglers in the early 1700s. I get very enthusiastic about history projects.

*What do you foresee as the future of the Foundation and the Trust? You talked about how one of them is going to be ending at some point.*

It's got to end sometime. The Foundation is going to change. I can't remember exactly who the first woman was who came on the board, but I think we're getting more diversity on the board of the Foundation. We're certainly acting in a much more professional way than we did twenty, twenty-five years ago. A lot depends, again, on politics to some extent, on the government.

We're governed by the IRS to a large extent and if the politicians in Washington say, "We're going to increase the required distribution on foundations to 10 percent," it'll be difficult.

There was a period of time when interest rates were so high. They were about 17 percent—the prime rate. We could pay all our grants and expenses out of income. We can't do that anymore. Now interest rates are so low you don't get anything, practically. You've got to dip into your principal every year to make your required distributions. I remember the first time we decided, "Oh, we can't pay all our grants out of income. We've got to go into capital." It was a shock.

*When did that first start happening?*

I think that was about the mid-seventies sometime. We suddenly realized we can't do it all out of income.

Those of us, many of the people in this country who are living on retired pensions or incomes are finding the same problem—you can't live on the income anymore. You've got to dip into the principal.

*What do you think your involvement in the Foundation and the Trust has brought to your life?*

Oh, my gosh, it's been such a part of my life for so many years now. At first it was kind of an aside thing. I was still working full-time in New York, and so I did the Foundation work on weekends and evenings. But then when I retired in '83, I devoted myself full-time. It's the kind of job where you need to do certain things at certain times, but you don't have to work every day nine to five. You don't have anybody really looking over your shoulder, so if you want to go out and play golf, you do. If you want to take a trip to Paris, you can.

I think for me it's been an experience in humanity. It makes you aware of the pressing needs of people in this country. We don't make grants overseas. Well, we made one. I went to Moscow with a volunteer group to meet with the Russian people to try to establish a YMCA in Moscow. I was on the board of the YMCA in Westfield for twelve years, and so that's how I got involved. But that's the only grant. We didn't actually make it to the YMCA in Moscow. We made it to the YMCA in the USA, which is in Chicago, and they funneled the money overseas. You have to go through so much more paperwork, though, and so many rigid requirements to make grants overseas that I'm not going to bother with it, and I don't see that changing in the future.

I think there's so much need here in the United States, so much suffering. I made a site visit to an organization. It sounds like a

Catholic organization. It's called St. Martin's Ministries. It was run by Benedictine nuns, but it's open to anybody. We don't make grants, either in the Trust or the Foundation, to religious organizations or churches. Once you start with one, then you've got to do them, so we don't.

There are a lot of organizations. Take Marist College, for instance. We've done journalism grants there in Marist. It's in Poughkeepsie, New York. It was founded by priests or monks—I don't know which. It was a Jesuit school. It's now open to anybody and it's not really run by the Jesuits anymore. Neither is St. Martin's Ministries run by the nuns. But they provide three different types of services for homeless women and their children. You'd be surprised how many of them are in our area.

We had annual fundraising last year, and one of these women spoke. I tell you, everybody was practically in tears. We had 130 people there for this fundraising dinner, and this woman spoke about her experience with St. Martin's and how much it meant to her. They give them a residence—a place to live for two years. They have a residence hall. They're nothing fancy, but they're clean. They have what they call the barn, where volunteers and organizations provide food, clothing, all those kinds of things. They give them education in reading and writing if they don't know how to do that very well, and they give them skills for job training and actually transport them to an employer who will hire them. Over the years, they've served I don't know how many hundreds of homeless women and their kids, and the need is growing because of the economic situation.

It's those kinds of things that make you feel good about doing what we do. You're helping people, and that makes you feel good. So I'd say my experience has been very uplifting and



something that helps other people. There are several different kinds of people in this world. Some people are very self-centered; they think only about themselves and what's good for them. But the broader range of people, I think, are more giving. I've learned that there's no other country in the world that has the volunteer spirit than Americans have. It's true. So many organizations and so much good is being done by volunteers who don't have to do it. They don't get paid for it. They just do it because they want to help other people. I think that's a good lesson. That's something I've tried to do over the years.

*Is there anything else you'd like to tell us about your involvement?*

There have been some disappointments, too. I sometimes feel like Chingachgook. Do you know who he was?

*The Last of the Mohicans.*

I've lost Rollie, who was a dear friend, and Vernon, and I miss them both very much. Not that the young people aren't doing a great job—they are.

*It sounds like the experiences on the board with the other board members have added so much to your life too.*

Yes, they have, yes. So I hope I can keep going for a while more.



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MARILYN MELTON

*Allison Tracy: Can you tell me about how you first became involved in the John Ben Snow Trust and Foundation?*

Marilyn Melton: I'm full of stories anyway, so here I go. My husband, Rollan D. Melton, and I were married in 1953. He was a journalism student at the university, and I was an art student. His first real job was with Reno newspapers; he was the sports editor of the Nevada State Journal. He progressed up the ladder at Speidel newspapers. By the 1960s or late 1960s, he was president of Speidel newspapers. Speidel newspapers had been started by John Ben Snow, Merritt Speidel, and Harry Bunker. There are a lot of stories of how that all came about.

My husband unfortunately passed away almost ten years ago, so you will not have the opportunity to interview him. I have to kind of fill in the blanks a little bit. As he progressed up the ladder in Speidel newspapers, he became very aware of Harry Bunker. I remember when Rollan told me, "Oh, I just

met Harry Bunker..." He had to explain who these people were.

I always had heard about John Ben Snow. I never met John Ben Snow. The reason for that was that John Ben Snow did not like women. When they had meetings in January every year with all the publishers, the wives were never included. They would go to Colorado Springs, where John Ben lived, and he held court and was the guy in charge.

Harry Bunker was a newspaperman from Iowa City. The next person who was closest to him in line was Charles Stout. They were both from Iowa City. By then, Merritt Speidel had died. Merritt was a newspaperman as well and had gotten John Ben Snow interested in the newspaper business. He passed away in the late 1950s. Rollan was pretty intrigued by meeting these people.

The story was that Charles Stout, Harry Bunker, and Mr. Malcolm, who was the lawyer for John Ben, were just sitting around the desk and decided that they would (and there was quite a bit of money involved because John

Ben had been so successful in the Woolworth Company) set up this Trust and Foundation.

The foundation is mainly to provide funds to John Ben's childhood home of Pulaski, New York. Pulaski is up on the right-hand corner of New York in the coldest part of the state, on Lake Erie. In the wintertime, the blasts of cold air and snow that come to that little town bring a lot of cold weather, but John Ben evidently still had great memories. He'd gone on to New York University, but he had these fond memories of Pulaski, so the Foundation took care of that. The Trust was to be given for charitable uses. They set it up right away that Mr. Malcolm, John Ben Snow, Harry Bunker, and Chic Stout were going to set up the disposition of this money.

My husband, Rollan, in the 1970s, became the backup person for Chick Stout for the trust. I guess I started going with Rollan around this time. They generally had meetings pretty much once a year. At one of my first meetings I went to Charles Lindbergh's childhood home. By the time I started going, John Ben Snow had died. I believe he died in the early seventies, so I never met him but I heard all the stories about him.

Of course, by then my husband had become president of Speidel newspapers. He changed it so women were always invited to the annual meetings. At the very first one, why, the old-timers were a little shocked that everybody had such a rollicking good time at the first Speidel meeting without John Ben. It happened to be in Reno. They went to a floor show, and it was a little different from the old-boy group that had met in the past.

Betty Stout, Chick's wife, was one of my most favorite persons in the whole world. I got better acquainted with Betty Stout when we went on these meetings. I got very friendly with all the Speidel wives and the John Ben Snow wives. It was a group that in some ways

was kind of dependent on each other, even though they were different. One group was the newspaper company, and one was the charitable foundation and trust set up by John Ben Snow.

So for many years I was friends with all of them. There were the two brothers—Bruce and Allen Malcolm. Chick retired and Rollan took his place on the John Ben Snow Trust and Foundation. Then, of course, there was Vernon Snow, and later Jonathan. That was the older group. I guess I've been through three generations now, you might say. The first generation wasn't there very long before they started retiring in the late seventies and eighties. So then I was with this group through the eighties and nineties.

When my husband passed away in January of 2002, Emelie, my daughter, was in line to take his place on the Foundation and the Trust. For the continuity after Rollan's passing, I took a seat also. That was the first time a wife had ever had any kind of participation. Last year, in 2010, Allen Malcolm died. He was the last one of our generation, and I looked around and I thought, "No, it's the kids' turn." They had all been groomed by their predecessors to take command. I thought, "They're doing a great job, so I'll just make my way out of here." I had not planned to do that, but Allen died so suddenly and unexpectedly, I think it was my time to go as well. I was involved from the seventies through 2010, so for forty years.

Of course, there were so many things that I was involved in with my husband, and with Speidel newspapers. Then it merged with Gannett, and he was on the Gannett board. So I was going to Speidel newspaper meetings with him, then his Gannett board meetings with him, and his John Ben Snow meetings. Those were three important things in his life and my life and brought many

exciting and interesting people into our lives. Many times the meetings were held in Reno, but it provided us with great many travel opportunities as well.

Now, with John Ben Snow, they tried to meet at least every two or three years in Colorado Springs, because that was John Ben Snow's home. They would always go there if it was his birthday. So several meetings have been held there.

We also met in New York, because it was easy for the people in New York, like Vernon Snow. I'm going to digress on a personal basis. When I met Vernon for the first time, he and his wife were, I guess, together. These are Jonathan's parents. Then he had another wife and she died, and then he had a third wife. So I went through a lot of family changes with all of these people. We became like a family. It is a small group of people, so you get to know them over the years.

The first time I met David, we were at Williamsburg. Now, there were several of them who liked to go to Williamsburg for meetings. We generally went to places we'd given money to and had some particular interest in. So the first time I met David was when we were in Williamsburg. He'd just graduated from law school and had gone on a hiking trip in Europe, and he met us there.

The next year, David got married. Now two of his children have graduated from college, and the third—his youngest girl—has just started college. So as you see, when I say it's been like a family, it means that we've been involved in each other's lives. Sadly, I've seen all these people depart. It's part of what's happened in my life now.

Allen Malcolm's first wife, Florence, was with us all her life. Florence died a few years back, and then he married Gerry. So we have followed each other through the trail of life. It's been forty years.

As probably any of the rest of them will tell you, I think John Ben Snow had no clue financially. In fact, these fellows who sat around the desk and made this plan didn't have any notion of sun-setting the funding of the Trust or the Foundation. They just thought perhaps that it would do it itself. But what happened is the corpus grew, and they were giving a percentage of the money every year. At one time we were doing quite well. The last few years, though, the stock market did not do well.

It turned out that there would be three entities. Say you had a million dollars you could give away in a given year. They would pretty much split it three ways. One part of it would be given out here in Nevada. One part would go to upstate New York, and Allen would have the other part. It would be Allen, Vernon, and Rollan. Generally, that was the way it was split up between the three.

It was really important to my husband and to myself to keep the gift of this money for charitable purposes coming to Reno. Rollan liked to give it to small organizations that wouldn't normally be given a lot of money, or to struggling organizations or to places that were just starting out. I think that probably there were a few things along the way that didn't work out.

One of the things that I know he gave a lot of money to, and it has been rather unfortunate, is what has been known as the Lear Theater. I think he gave around \$100,000, but not all at once. Some organizations got, say, \$20,000 or \$25,000 every year for three or four years. It's very sad when you have poor management, and the Lear Theater was a struggling thing. It's very sad that that one didn't work out.

Rollan was very generous to the Judicial College. He helped Reno Little Theater along the way. Rollan became a full director around

1975, so there were twenty-five years there when he was very active in disbursing this money in northern Nevada. Occasionally he would like to make sure things happened here in the West.

One time we were going through Montana. We were in Billings and we went into an art gallery there that was in a little old jail. They were making it into their future—it it was going to be the art gallery. I think it was about a year or two ago that I went back there, and now it is a beautiful, beautiful gallery and museum with a big building. This little section of what was the jail then is hardly noticeable.

One of the reasons Rollan was interested in giving to that was that Will James had his start here in northern Nevada—in Reno and Washoe Valley—and ended up in Billings. A great deal of his artwork is in that museum. So there was that Reno, Nevada, connection as well.

Another one he made sure got some money was the Aeronautical Museum down in Tucson, Arizona. So it wasn't just northern Nevada, but primarily a third of that money went as a gift to northern Nevada, and it still works out that way.

We wanted to make sure that this money continued to come in this direction. I think all the people on the John Ben Snow Trust and Foundation have been very serious about how the money is disbursed—very conscientious. They have followed through quite well, I think, which is a tribute to John Ben Snow and the people who sat at that desk those many years ago.

*You said that you had never actually met John Ben Snow but had heard a lot about him. Can you tell me a little more about what you had heard?*

Oh, indeed. There are lots of stories about John Ben Snow. He met Merritt Speidel in the middle of the night, because they both worked very late. Merritt Speidel was working at the newspaper and John Ben was working at the Woolworth Company. They were both very young and starting out, so they noticed each other leaving their various offices very late at night, and they became very friendly.

Later, John Ben worked his way through Woolworth's. Woolworth's is still quite big in England. I was in South Africa visiting friends, and they call it Wooly's. So Wooly's is still a viable company, though it probably is a whole different company now.

When John Ben went to England, he opened all the Woolworth stores in England. He was a very short man, but I guess he had quite a personality. He loved horses, so he got involved in the hunts with the foxes and the horses. He had a big stable of horses and was quite happy with his life in England. I believe he said that his life was divided in three, beginning with his young life, and then his life in England and with the hierarchy of Woolworth, which he ended in 1938. He then retired and came back to the United States and called his old friend Merritt Speidel. They'd kept in touch over the years. So he gave Merritt Speidel a million dollars, which was unheard of. A million dollars in 1938 was a lot of money.

Merritt Speidel was a very outgoing guy. He was the sideshow barker—the guy with all the personality. He wanted to start a newspaper company such that, in one day's drive, he could be at one of his company newspapers, so they had to be about 300 miles apart in those days. He started out in Poughkeepsie. I don't know whether that was the first one he bought. He did end up with that dream, though, ending in Visalia, on the other coast.

That was how John Ben became involved with the newspaper business, through Merritt Speidel. Merritt got the money from John Ben Snow, and John Ben was kind of in the background. He was the angel who saw that Merritt had his dream, but Merritt himself was using John Ben's money.

Merritt Speidel had two sons. One was found floating in a swimming pool one day. They didn't take over from their dad. I gather that maybe it was Alzheimer's in those days, but that's why Merritt Speidel had died rather early.

When John Ben came back to the United States, it was around 1938 and World War II began in 1941. Merritt Speidel had wanted to live in California, which he did, but John Ben didn't want to be that close to the coast. So the war had something to do with the reason he lived in Colorado, but he was very interested still in horses and he had the ranch. He started the Western Horseman magazine, which is still going today. At the time it was spun off from Speidel newspapers, so John Ben owned it for a considerable time.

He had a secretary by the name of Beryl Eaton, and she was devoted to him. There were these secretaries who were devoted to John Ben, but he personally had no interest in women in his life. He evidently got on well with the men. It was kind of an all-guy thing, and so that's why Harry Bunker and Chick Stout and all these men were very close to him.

Beryl Eaton had a brother, and they were the ones who cared for John Ben. As he got older and older, he needed these people. He got to the point where he couldn't ride a horse any longer, and so he had a mechanical horse made. We saw it when we were back at one of the meetings in Colorado Springs and as far as I know it's still there. There are mechanical

horses where you put a nickel in and put the kids on it. It was similar to that, but he had it made for personal use.

There was a girl who was in my class in high school, who was one of the Eatons. I saw her a couple of years ago, and she reminded me of that. I was not that friendly with her in high school and didn't know who she was at the time. She still has family here, I think, so there are still Eatons around who would know something about John Ben.

He was a character and all the men liked him. He evidently had quite a circle. In Colorado Springs the big hotel there is the Broadmoor. The Broadmoor was where, every January, all the Speidel men would have this meeting. There was a special building that they always met in, and they had a great guy get-together.

*When Rollan was serving on the board and you started going to meetings with him what do you remember the board being like then?*

As I say, when I first became involved, John Ben was still alive, so it was after he had passed away that I started attending. That would have been in the late seventies. Rollan was going to take over from Chick Stout, so by then there were women involved. It was a very small, tight group. It was just the Malcolms, the Snows, and then the Meltons, and then there was always the lawyer.

Now, when I first started going, there was always a representative of the Bank of New York, because the Bank of New York holds all the money for the Trust. I think people don't realize when they sit down to make these trusts or charitable foundations, that there's going to be a fifty years from now or a forty years from now. John Ben and his associates sat there and made decisions that I think were



well meaning. They made certain there were restrictions with the Bank of New York. [The Bank of New York is the only bank allowed, according to John Ben Snow's will, to handle the money.] John Ben probably had friends at the Bank of New York and did banking there, and maybe through Woolworth's, so he had great faith in them. But things change. Banks have been sold and bought and merged, and the people you dealt with move on.

That money has always been with the Bank of New York, and it probably isn't one of the biggest accounts that they have. In fact, it's probably a small account. All this money gets thrown into a pot, I think. They've always had representatives attend the meetings, and, fortunately, they've kept the two that have come for the last fifteen years. There was a fellow there who was very different and there was a woman for a time, but the representatives they have sent for the last fifteen years are really nice guys.

Again, you get involved with those people, and then they go away and there's somebody else. What happened with the board is that they don't have the flexibility to say, "I don't like how you're handling the money," or, "We don't like what you're doing now."

Allen Malcolm was very, very religiously watching all the money all the time. It's good to have somebody like that. Allen was very involved. Because it's a big bank, you have the flexibility of saying, "I don't like this. We want to do this." He was able to tweak it a lot. I think Allen was constantly tweaking where the money was invested.

Because John Ben was so involved with his hometown, he said that there always had to be a Snow on the board, and that that Snow person had to live within 100 miles of the little village that he came from—Pulaski. Well, it's worked out fine. Vernon taught at Syracuse University and that was where his career

was, so it worked out fine for him. I'm sure David would never move to that part of the country. Jonathan has been able to have a job where he could commute to Michigan (where he was involved in the automobile business). Jonathan could work out of his home, and so he lives in Syracuse and he probably doesn't mind. But who knows whether his two sons will grow up to take this job?

Jonathan and David have both been really good, particularly Jonathan. He just grew up knowing from Vernon that that was his future—he was going to have to do this. Vernon just was so devoted to John Ben and the whole idea of having this wonderful situation where they had to be involved. For the Malcolms, it was their dad who was the lawyer, so John Ben made sure that they were involved.

Over the last couple of years there was a lot of friction between Allen and Bruce over whose children would take over. They thought, "This is our legacy. We have to take this." Well, it isn't. There was nothing in the will that said there always had to be a Malcolm, but they have made sure that that's what happened.

The Bank of New York may not be the best bank and maybe the children of some of these people are not going to be the best to carry on the tradition. I think family often are responsible in family, and sometimes they want to do it and do a good job, and sometimes they are not the best. Anyway, it's still the Meltons and the Malcolms and the Snows.

We have had in my time three lawyers, and now they're on the fourth lawyer—a woman from Syracuse. That's worked really well. The lawyer who was with us the longest was Joe Mitchell. Joe Mitchell was the glue that kept this place together. Joe has this wonderful personality where if there was disagreement

or if there were family issues, he has this wonderful sense of humor, but he also had this wonderful way of getting people to stay on track—guiding the ship.

I think Joe figured a few years ago that it was time for him to go. He had another family foundation that he was working on. I think he felt that he'd guided this group into this next generation, and he felt it was in good enough hands that he could walk away from it. Nothing's perfect, but these people have done a really good job.

*When wives were finally allowed to come to the yearly meetings, were you able to actually sit in on the meetings?*

Socially. Wherever the meeting was, they would have things for the spouses to do. If we were in Williamsburg, we'd be off to see certain parts of Williamsburg. When we were in any of the communities where the board members lived, they'd set it up.

I was the first wife who ever walked into a board meeting, and that was after Rollie died. I just think in a way it was okay. It was all right with me and it was all right with everybody because it was still this transitional time. About that time they had lost Vernon. In some ways, there's always been some kind of personality issues that have come up between people. My idea of being there myself was not because I knew so much about what was going on. My daughter is really good. She is very smart and she's very good as secretary—much better than myself. I think I was sort of the transitional person. Allen was still on the board and we'd lost Vernon, so it was a timing thing.

When Allen died, I thought, "I'm out of here." But I had eight years of helping Emelie, and she's excellent. She's so good at finding these people who have applied to get some

money and she looks into it. Now her job is taking a little more of her time, but I think she's got her husband in to be her backup now, which is good.

*What is the difference between the Trust and the Foundation?*

The Trust used to have about 30 million dollars as the corpus, but I don't know where it is now. It dropped way back during the recession. They give a percentage of the corpus that we can give each year. If that percentage turns out to be a million dollars, then they split that up three ways—one goes to the Meltons in northern Nevada, one goes to Jonathan Snow, and one goes to Allen Malcolm. Those were the three who split up that pie, and the money went to the areas where they lived.

The Foundation is primarily for Pulaski. I've been there many times. The people who have been to Pulaski know it as a fishing village. It's got a little stream that runs through, and visitors who like to fish will go to Pulaski. There are buildings all over the place that have John Ben Snow's name on them, and that's where John Ben is buried. That's where Vernon is buried. There's the Snow family plot there.

They have a community home. They've done things for the schools. If you took away what John Ben Snow has done for that little village, you would see a big difference. It is a place that has not grown or will ever grow. It's a pretty little town when it's summertime, but when it's wintertime, it's not a place where people want to go and live.

I should know how John Ben Snow's parents happened to go there. I think there was a religious community that they were involved with, and that's how they all came to be there originally. It still is a cute little

community and viable. They have the grade school and the high school. It's never going to be any bigger, though, and it doesn't have much to recommend it after it starts to snow. It may get a lot of snow, but there are no mountains to ski on. [laughs]

The Foundation is handled differently. Emelie could tell you this better than myself, since I was a backup to Emelie. I was never a full member—I could vote in the Trust but not the Foundation.

Bruce Malcolm was always like me; he was a backup for Allen. Bruce is the dentist. I could tell you all these family stories too. They had all these issues. There are a lot of little intrigues with family issues, particularly with the Malcolms.

Anyway, there were only three of them who could vote—I'm going to get that wrong, so you'll have to check that with Emelie—who votes on the Trust. When we go to a meeting, there are only ten people sitting around the table. So three or four of them can vote on the Foundation but not on the Trust. The backups, like myself and Bruce, could vote when it was something about the Trust. I think I got that right. [laughs] I was never an officer, never wanted to be. I was just there, and that's okay.

*So there some overlap on the board between the Trust and the Foundation.*

Oh, yes. There are four people who can vote on the Foundation. On the Trust, though, the people who are the backups could also vote.

There wasn't that much business for Pulaski, because it's a smaller town. When we have the meetings, the people who would handle the money would give all these presentations. The strange thing about it was that the people giving all these presentations were actually for the Foundation. There's less

money in the Foundation, but we had five or six managers. At meetings we'd hear from all these managers who were managing the Foundation money. But when it came to the Trust, which is the bigger amount of money, we'd have one (the Bank of New York).

[One of the banks that managed the Foundation account was Toqueville.] Drew Rankin worked for Toqueville. They all had these big presentations that they did, and he did very well with investing money.

Then we have that darling little Ann. She's been there forever and she adored Vernon. She knows everything about all these financial things.

I personally didn't take it as seriously as I should have. I helped more with Emelie. When she'd get her little pile of people who had applied, we'd go through them. It depends on the people who are doing this too. Emelie, because she has children, is very interested in children. So we put the roof on the Children's Museum that they're building downtown. It's a green roof. Emelie likes to do a lot of things like that.

From the very beginning, I thought it was Emelie's job to take over from Rollan. I really felt I would lay back and let her be the lead person, and she's done a great job.

I guess you don't realize that when you're younger, your life is in chapters. When you're reading a book and you finish a chapter and you turn the page, you're starting in anew. You don't realize that those people that you've turned the page on are no longer in your life or that that part of your life has passed. You don't realize it. You've just moved on. So I have to dig a little bit to get back into John Ben Snow.

Starting in 1960, when Rollan was corporate with Speidel, and then Gannett, we were going to Gannett board meetings and John Ben Snow meetings. I did travel with

Rollie. By then my children were pretty much grown up. Emelie was in high school in the seventies. So I didn't have kids to deal with. Rollie later was on the American Newspaper Publishers Association board as well. We had a very interesting life, but it was very busy.

*What are your memories of the annual meetings that you attended?*

The Speidel people would meet twice a year and every other year in New York City. I have to be careful not to get Speidel Newspapers mixed up with John Ben Snow. It was in 1968 when Rollan became publisher of Reno Newspapers. It was about '68, when he became publisher, that we then we got involved with John Ben Snow.

Vernon was always kind of the mainstay. He was really the face of John Ben Snow's Foundation and Trust. He was the elder statesman, you might say, of the John Ben Snow Foundation.

The very first meeting I went to, Jonathan's mother and Vernon were still married. Then Vernon married this woman who had an apartment in New York. Flo and I became very friendly because it was such a small group. So she and myself were really close friends. In fact, Flo and I were sorority sisters.

When you ask about places, I keep going back to Colorado Springs, because I think we went there more than once, as well as New York City, Williamsburg and Syracuse. We went to Syracuse several times because that was Vernon's home. A lot of the money Vernon got went to Syracuse University. We did go to Milwaukee at least once, and it was really interesting.

I found that being with Speidel Newspapers and John Ben Snow, we got to see a lot of the United States of America. These were little towns. These were not the big cities. So we

were going to Iowa City, Little Falls, and Fremont, Nebraska. Those are Speidel towns. That's where my first meeting was—Little Falls, Minnesota. There's Great Falls and Little Falls, and that's where Lindbergh grew up. That was my very first meeting.

We went to Chillicothe, Ohio for a Speidel meeting. These were places you would not have visited had you not had a meeting to go to. So you'd fly into the big city and then get a car and drive to these little towns. I felt very fortunate and lucky that we got to be involved in those little communities. I think it was the same with the John Ben Snow group. It was a small group. We didn't generally meet in the big cities. It was generally the small places where each one of these people lived. Chestertown was where Allen and Flo lived.

Flo was a history buff of early America, so her house was an early American, historic home in Chestertown. Everything was quite authentic in her house. She was a gardener, and her house had the most beautiful flowers that she'd gardened in the backyard. When they moved to Maryland, why, there again she was gardening there. I was in their homes more when we went to these meetings.

Vernon was a history professor and an academic, so he looked at everything in an academic way. Allen, although he was a lawyer, was the kind of guy who dotted the i's and crossed the t's. He made sure everything was properly done. So that's the sort of thing they brought to us. My husband Rollan was more of an outgoing person and more interested in people. He was always the people person, and he loved being a part of the John Ben Snow Foundation and Trust. He really took it very seriously, and he really loved it. First of all, Speidel Newspapers was where he started out and came up through the ranks, and John Ben Snow was a big part of the history of Speidel. Rollan just loved all

of these people. He enjoyed meeting those original guys like John Ben Snow and Harry Bunker and Chick Stout.

Then they left us all, and then he felt a great deal of responsibility to carry on for those people. He always liked all the wives and the women and wanted them included in all the meetings. He was more expansive. He loved working with Vernon, Allen, Bruce, and the wives. They were very close friends.

*When you became more formally became involved in 2002, do you remember who was on the board and who were serving as officers on the board at the time?*

They rotated it. I'm not going to get them in sequence, but during those years there was Vernon, Allen, and Jonathan. It was always guys, though. Emelie was the first woman. That was another reason why I went on—because of John Ben Snow, there had never been a woman. Actually, our son Royle was going to take over from Rollan, but that didn't work out. So I said, "Well, Emelie's got to be the one because Emelie is bright enough." By then she had finished college and she was ready. I said, "You've got to groom Emelie for this position, because we wanted to keep this money coming to northern Nevada."

So then when Rollan died, Emelie was the first woman with a position on the board. She's served as secretary and she's done that for a few years now. I don't know if they will ultimately make her president or chairman.

It's very small group. Bruce, because he was a backup, would never have been an officer. So it rotated between Jonathan, David, Vernon, and Allen. Those four all served during the time that I was sitting there.

*Can you describe the process of grant making?*

It's written into the guidelines, but they're pretty broad. They don't give to salaries, I believe. They can be used for bricks and mortar. The guidelines are broad enough so that it gets pretty much interpreted by whomever is in charge.

In our case, it was always my husband, Rollan, for twenty-five years he was giving. For his criteria, education was great, and that's one of the things he gave to. So they were each pretty much able to interpret the guidelines.

In the little town where Allen was living he had given handicap access to a museum that didn't have the right facility. So when I say they gave to bricks and mortar, I mean they could do that. In New Jersey there was a community that Allen liked to give money to. He also liked the YMCA facilities. Emelie doesn't give to the YMCA.

They all had their pet projects that they gave to, and they've tried to spread it around throughout their communities pretty well. I think they've done a pretty good job. It was flexible and broadly interpreted. The guidelines are on the websites now. Websites are big. Anybody who wants to apply can go on the website and get the criteria they need to meet and the dates they have to have things in by. The way it works is by January 1<sup>st</sup> they have to have a letter of intent—just a one-page letter—that describes where they want to go with the money that they get. Then we give them two more months, and by March 1<sup>st</sup> they have to have a full-blown presentation. It's either March or April 1<sup>st</sup>. By then they then have to have a better description of what they want to do.

It's so funny when you're doing these things (and I've spent twenty years on the Nevada Humanities board doing this as well), how people don't read the directions. They don't get it right. Right away you can cull out a bunch of them. Sometimes they're late, and



they call. I know they'll call Emelie and plead, "My cat died and I couldn't get my...." We have to deal with a lot of applicants, but the best will rise to the top and it becomes fairly easy.

As our money got tighter and we didn't have as much, we'd go through and pick the ones we liked, and then start chopping from the top. We were taking two or three thousand off the top of all of them so you can give to more people. You figure, though, they get so they expect that, so they ask for more, knowing you're going to cut them back. That's the way it works.

*Is the grant process similar for the Foundation?*

Even though the Foundation would get all the financial reports about the money for the Foundation, there was never that much discussion about what was happening in the village.

*During the time you've been involved, have you seen any shifts in terms of the type of programs people were trying to get grants for?*

Vernon, as I said, was more academic in his interests. Allen was more into social things, whereas Emelie, on the other hand, works for the Food Bank. She's looking after the poor. There are always the needy, and there are the institutions that are drama or music institutions.

Jonathan, who has taken over from Vernon, is very religious and has an interesting family. He has two sons, and then they adopted a little girl. Now they've adopted two more little girls who are from Africa. He's very broad in thinking about helping those who are underprivileged, which bleeds over into educational opportunities for the underprivileged and the needy.

Allen was always for the YMCA. There was a big replica of a 1700s boat that was restored. They take children out on it. It's not so much for the needy, but an educational tool. They all did good things, but in different directions sometimes.

*What types of John Ben Snow grants have been awarded in Reno and northern Nevada?*

[Marilyn begins reading from an annual report for 2008] In 2008, for the people who applied, we tried to give to almost everybody, but we didn't give to all of them. There was Artown; Assistance League; Big Brothers and Big Sisters of Northern Nevada; Camp Lots-a-Fun; Children's Cabinet; Churchill Arts Council; College of Southern Nevada; Committee to Aid Abused Women. We gave to all of them.

We gave to Family Promise and to First Tee of Northern Nevada. First Tee is to teach underprivileged kids how to play golf. There was the Food Bank of Northern Nevada; Friends of Washoe County Library; Gathering Genius; Keep Truckee Beautiful; Modoc Forum Surprise Valley Writers Conference; Nature Conservancy; Nevada Blind Children's Foundation; Nevada Diabetes Association. As you can see these are all over the place.

We gave to the Nevada Humanities Committee for their online encyclopedia, specifically for the Nevada Native American portion. So it's pretty broad.

We gave to the University of Nevada Oral History Program. Hmm, I wonder who they are. [laughter] There was the Reno Chamber Orchestra; Reno Philharmonic; Solace Tree; Saint Mary's Foundation. We've given to them for many years for a van that takes dental care to people in need.

We made a commitment to give the University of Nevada Medical School a total



of \$150,000 for their new medical school and nursing buildings. We were giving them \$50,000 three different times because we can't give that much all at once.

We gave \$83,000 to the Snow's Fellows Endowment. That was in honor of Vernon Snow, and that went to the Syracuse University Maxwell School. The Maxwell School is a journalism school, so that is partially for journalism and for Vernon as well.

The total requests we had, and this is probably in the ball-park for every year, was \$905,000. As I say, we had to cut back. We gave \$380,000 in 2008.

Emelie makes our little book. Vernon and Jonathan would put together kind of a rundown, and each person on the board would get one of these. It has the organization name and a thumbnail sketch of what we're doing so that we don't have to go through it all. At the meeting, we go through this book, which covers how much they asked for, how much we gave, and what it was for.

For the Committee to Aid Abused Women, they wanted to add to their building—it needed a renovation and they needed to increase the building to seventy beds. They had an estimated cost of 640,000, so obviously they went to other groups to get money as well. We gave them \$25,000 towards that project. So this is what we do every year.

*So each person from the different regions where Trust money is granted gathers together those applications and summarizes them for the rest of the Trust.*

Right. We go through all three groups' applications. The request was \$900,000 and we gave \$380,000. That number—\$380,000—is what we're told, before we even get there. They have figured out that that's how much money the three groups are going to get.

When we get \$900,000 in requests, we have to figure out who we are going to give to. Each one of these requested \$10,000. Some of them didn't get any. Some got \$8,000. Sometimes we'll bump it up a little bit when we feel that they're particularly a good cause, though we don't do that very often. If they ask for \$10,000, for example, and we think they're really good and want to help them out, we'll give them \$15,000 if we can pull it off.

*What are the guiding principles of the Foundation and Trust in terms of their mission?*

They are flexible and broad. The main focus is education. The feeling that I get is, having served on John Ben Snow and having served on the Nevada Humanities Committee, anytime you have somebody else's money to give away, it's really nice to be in a position to do that. It's not your money. With the Humanities Committee, it's generally money that comes from the government. For John Ben Snow, you're serving somebody who made a lot of money, who did well, who worked hard to get that money, and who had a vision. You're given the responsibility as well as the pleasure of doing something for your community. If it was your money, how would you do this?

It's a great responsibility, but it's also a great honor and a privilege to be involved in something like this. I think my husband felt that. He passed it on to our daughter and myself. It gives us all a great deal of pleasure, but it also does something really wonderful for our community and university.

Of course, now in 2011, you find everybody is bleeding from lack of money and your responsibility is even stronger. The fact is the people who are coming to you really, really need to do good things, and we need to do good things. We have to keep continuing

to hope that this continues, but we have less money, too. Maybe the stock market has been a little kinder to us this year than it has been in the past. It's coming back a little bit. The last couple of years, though, we had to cut back pretty significantly.

*What do you see as the future of the Foundation and the Trust?*

Who could tell when they sat down at their desk to do this what the future was going to be? I think the people who have thus far served on this board and committee in the last thirty-five to forty years, have done a really responsible job. They have made not a big huge splash in the community, but they don't give one big hunk of money away. They've spread it into little corners of the community, like the new Children's Museum and the Committee to Aid Abused Women. We're all over the place. We're helping children. We're helping elderly people.

If it just goes on like it has been, and as long as there's some money left in that pot and we can give it away.... I was talking to somebody the other day who said the Don Reynolds Foundation is sun-setting. They've got to give it away. I've never quite understood that. Fleischmann's has since done that, and I know Chick Stout himself had set up a foundation. I don't know if it's sun-setted yet, but he said, "Well, nobody's going to know who Chick Stout was." Well, I don't think that's the point. There's nobody sitting at the table of John Ben Snow now who knew him. That generation is gone.

Who knows what the future will ever bring? If we can continue to try to be as good as we have been in the past, I would say it's damn good.

I probably have said this already, but those people who sat there and started this didn't

know where they were going, but they did a darn good job. If I were to change something, I would give the board a little more flexibility, rather than having to have just the Bank of New York. Still and all, it has all turned out well. The people are responsible and have continued to be responsible, and yet they've had a good time along the way. They've made good friends, been like family, and been good to one another as people. I cherish the time that I had with these people, and I cherish the fact that I was part of spending somebody else's money in a good way.

*In the years that you've become friends and gotten to know people on the board, are there experiences or memories that stand out for you?*

We just became really close to one another and had lots of good laughs. Vernon's second wife told stories and kept us all laughing. We had and shared such congeniality.

One of the saddest stories was when Rollan had gone down and met with Vernon in Florida and came back and told me that Vernon had cancer. It was not terribly long after that that we were meeting in Syracuse. I walked into the room and I had to do a double-take. Vernon was very ill, and I had no idea how ill he was until I saw him.

They went through the meeting, and we went up to Pulaski. We had our picture taken and had a very nice meeting. Then as we left, Elizabeth, Vernon's wife, and myself, went shopping. We went and had lunch in this cute little village. I still have a couple of things I bought that day—I will always remember that event. Elizabeth was really worried about Vernon because his health was so poor.

We left and went to Cooperstown, New York. It is another place where we had some great meetings. It's a very interesting place. We were in Cooperstown when they called

and said Vernon had died. He was not going to make it, but he had just stayed alive for that meeting. I guess the minute the meeting was over, he died.

We went back and Rollan gave the eulogy at Syracuse University Chapel. It was quite moving. Vernon's fellow professors were there, and it was really quite nicely done. That was the end of that meeting.

The meeting last year, when Allen had married Gerry, they were excited about having us come to Baltimore. Allen died about a week and a half before the meeting.

As I've said, that chapter in my life was over then, but it's a new chapter for the new people—the younger group. I think they will set their own pace and do some good things.

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JOE MITCHELL

*Allison Tracy: Before we talk about the John Ben Snow Foundation and the Trust, can you tell me about your background, your family and where you were raised?*

Joe Mitchell: I was born in New York City in 1948. I went to school out on Long Island. My family moved, right after I was born, to Nassau County. It is the next county over on Long Island from Queens, which is part of the city. I went to Georgetown University School of Foreign Service as an undergraduate, and as many aspiring diplomats do, I wound up in law school afterwards. I went to Columbia Law and graduated in '73. Then I practiced law at two firms. My practices were how I came to know the John Ben Snow people. My practice continued until 1992 with my law firms, and then I went to the house of another charitable foundation, but I continued on as an advisor to the Snow Foundation and the Snow Trust until about two years ago.

*Can you tell me a little more about how you became involved with the Foundation and Trust?*

I started practicing at a firm called Mudge, Rose, Guthrie and Alexander in the early fall of '73, and they had been retained by the Irving Trust Company, which is now The Bank of New York Mellon. The bank was named as a co-executor of John Ben Snow's will, and I was the junior lawyer on that account. So I worked on the end, really, of Mr. Snow's estate. He died in late '71, and so by the time I came in, the estate was being wound up and the Memorial Trust, which was the residuary beneficiary of his will, was being set up. The trustees of that trust and the companion foundation (which was set up in 1948 in corporate form) were just about to sit down and decide how the existence of the Memorial Trust was going to change, how the Foundation did business, and how the Trust was going to do business, and then how they were going to work together. So that goes back to '73 and probably early '74.

*Can you talk a little bit about the difference between the Trust and the Foundation and how they operate?*

Yes. This is really sort of a unique setup, and I have to say that I don't think anybody has a complete understanding of why it was set up this way. I know people have views about this, especially Allen Malcolm. Allen's father was a man named Talbot Malcolm, and he was John Ben Snow's lawyer and primary advisor and actually drew the will. Allen was a lawyer at the time working for the Irving Trust Company and may or may not have been involved.

The thought was that initially—this is the version that I heard and makes sense to me—Mr. Snow was to leave his entire estate to the Foundation, which he'd set up in the late forties. The idea was that he had balanced the power on the board among the various aspects of his life—his family, his connections in New York, that would be Talbot Malcolm, where Mr. Snow had business connections, and also his retirement job, which was out West. He bought the Speidel newspaper chain, which had been another great success. He'd made some connections out there that he wanted to recognize. He trusted all these three groups of people: the family, the New York group, and the westerners. So he was going to leave all the money to the Foundation.

About the time that he's working on the will, there is a big change in the law being contemplated in Congress, which ultimately became the Tax Reform Act of 1969 (which is the subject of a whole other interview). Not unlike what happened in the past few years, Congress was all riled up over perceived abuses in how charities operated and wanted to regulate them, and they were especially concerned with private foundations.

A big leader in this was Wilbur Mills, who was the chairman of the House, Ways and Means Committee and later on went into the history books for winding up in the Tidal Basin with a stripper named Fanne

Fox. He basically wanted to clamp down on foundations, and according to sort of the internal lore of the Snow group, it was thought that maybe these new rules would not apply to a charitable trust, which was sort of an older form of foundation. Now, there's no distinction in the tax law, either before or after the 1969 Act, about how foundations are treated, if they're organized as a trust or as a corporation. There was some thinking, though, that maybe the Trust would have more lenient treatment because it was more directly under the supervision of the local courts and the attorneys general of the different states.

My personal view was always that there might have been a political reason for it. This was a way of mimicking the division of power in the corporate form foundation, but sort of streamlining it and taking some of the politics out of it. The initial structure of the Trust was you had the bank, and the bank basically was supposed to take primary charge of the investments and do the administration. Then it was basically this tripartite division that we talked about before. There was Talbot Malcolm, who was really the New York connection. There was Chick Stout, who was the business guy at Speidel newspapers. Then there was Ralph Snow, who was one of two relatives that Mr. Snow had located. He had no descendants. As Talbot would say, he had no descendants that he admitted to. So there you had that same sort of structure, but it was a much more linear process because you had three people as opposed to the larger board of the Foundation.

For whatever reason, this two-part structure was created, and for that reason they realized that they would have to get together and figure out how they would work together, so there was a meeting. I'm trying to think when it was. It was probably in February of '04.

There was a meeting down in Naples, Florida, and that was really the organizational meeting which set the structure and the procedures which really have not changed ever since.

Some decisions were made that made sense and sort of flowed from the process. For example, it was decided that the Trust and the Foundation would always meet together, though on separate days and have separate formal meetings. Up until this time, the Trust, of course, had no meetings, because it didn't exist, and the Foundation would have perfunctory meetings to ratify John Ben Snow's personal views. You'd basically meet for a half an hour in his office and then go have lunch. It now became more of a businesslike process.

It was decided the two groups would meet together, and there was an overlap between the two boards. Every trustee was also a director of the Foundation. A division of labor was decided upon pretty early where the Foundation, which was a smaller entity, would focus on John Ben's original interest, which was western New York, especially taking care of the town of Pulaski. It was John Ben's hometown, and a place he left in his late teens and never returned to, but where he felt he had acquired the values and the abilities that let him succeed later on. He had set up a structure that would look to taking care of Pulaski and the environs. That, by the way, was ratified in the will. The trustee of the Memorial Trust, which is a family member, has to live within fifty miles of Pulaski, and that was essentially a way of making the Trust captive of the local community, because they would always have a way of finding somebody who was a trustee.

*Can you talk a little bit about the scope of the Trust and how it came to give money in certain geographical locations?*

This gets into a thirty-year discussion that I had with Vernon Snow, who, as you know, was Ralph Snow's successor. They were close relatives, but they could not have been more different people. Ralph was, I think, Dean of Men at the Moody Bible Institute. He had a very focused view of good and what should be done. Vernon was really a quintessential man of the world. He was an English constitutional history scholar and had thought deeply about how charity functions and charities around the world and wrote extensively about it. He was really my mentor in terms of thinking about how foundations operate.

Just anecdotally I'll tell you, when I went to work in house--I'm now president of a private foundation--I said to Vernon, "I owe so much to you because you taught me so much about how foundations operate."

He said, "Yes, but unfortunately most of it is by negative example." I think what he meant by that is that he struggled to create a coherent program where the Foundation board would come together and the Trust would come together and agree upon how things would operate. I think the Foundation achieved that mostly because of John Ben Snow's original vision. The Trust, though, basically developed a system whereby each of the three individual trustees would develop their own program within their geographic area of interest over and above certain programs which were put in place either by Mr. Snow or extrapolated from Mr. Snow's interest. There was a big chunk of money that went for many years to professional education, NYU principally, the business school and the law school, and also New York Law School. There were some other grants along those lines too, but over and above those amounts, Vernon's was less focused geographically. His grants tended to follow his interests.



I don't remember so much Ralph's grant interests, but later on Allen would focus on his area of interest in New Jersey. Chick Stout and then his successors, Rollie Melton being the one that I worked with mostly, would focus more on the West, and they tried to create some themes, which arose from what the facts were. I mean, they didn't sit down and decide, "We're going to have two programs. We're going to do this and this, and we're going to do it on a national basis or at least in a regional basis, depending wherever the trustees are."

Then here's the Foundation focusing on Pulaski, after they've done every conceivable thing they could possibly do for Pulaski. I think they asked them to put the sewers in, and they said no. They drew the line at that, but they built them a library, they built them a Recreation Center. They create a revolving fund to improve the storefronts on the main street. They provided scholarships for the high school students to go to college. There are all these programs designed to put money back into Pulaski.

Then they started moving out into the surrounding area, and they did library improvements and things like that. That was really a focused program that came from a vision, which is to improve communities in this particular geographic area and to help them do things that were beyond the means of the people and organizations and even the government, really.

So that's the distinction. There was commonality, and some trust-wide programs in place in Memorial Trust, but there was this sort of overlay of "This is where I give money, and if I move, the program moves with me." I'm not criticizing or second-guessing the grants that were made. It's just when you think about most effective philanthropy, as Vernon and I did a lot, he felt that that was a failure, that he had not been able to

exercise enough leadership to have a more coherent policy. Part of that is almost wishful thinking, because there really wasn't that much money here. It's basically a regional or local foundation in terms of size, but the board is scattered around the country, so it would have been a hard thing to achieve.

*Understanding that the Trust's interests are based regionally where the board members are and the Foundation has the purpose of improving Pulaski and the surrounding area, are there any broader philosophical principles in which grants are given through either the Trust or the Foundation?*

I think not. Within a particular area, a trustee would develop an interest. The westerners are very interested in journalism, for example, so there was a big grant to Syracuse University School of Journalism. There were many grants being made in that field over the years, and that reflected John Ben's interest in newspapers at the end of his life.

There were themes of professional education, higher education generally—making that available to different groups. I'm trying to think of just the really big things. I can give you an example for the Foundation, from the president who was on the board since 1982 and I had been in the office since 1992, we've always had two programs. We do the performing arts, and then we do something in health care and/or the social services. There's a philosophy behind that. If you give money to the Metropolitan Opera and you want to go to heaven, you have to give money to something that Senator Grassley would recognize as charity. We've been incredibly consistent in doing that. We have in the arts a very narrow, focused way of giving money which we've followed consistently since maybe about 1989,

which is really the beginning of the modern era here after the founders had died.

The other program we've adapted a couple of times based upon the changing need of the constituency. I don't think there was that sort of top-down thinking going on here in the Trust. I would say this is not uncommon. I practiced in this area for twenty years, and a lot of foundations operate this way and they do a lot of good, but it's probably less effective than trying to identify a problem or an area that you want to address and then focusing all your resources on that one area.

*When you first joined or you first became involved with the Trust or Foundation, can you talk to me a little bit more about who was involved at that time and a little bit of what you remember about these people?*

I'm not sure I have it all right in temporal relief, but I certainly can tell you the big personalities. The trustees were the original trustees. There was Ralph, there was Chick Stout, and there was Talbot. It was a really interesting group of people, I have to say. That John Ben would put these people together was just almost beyond belief, because they could not have been more different.

Talbot was just an unbelievably larger-than-life person. He was extremely bright, a great raconteur. He was at the end of his life. He was not well physically, I have to say, when I knew him. In fact, at the meeting down in Florida, the original organizational meeting in '74 was really his swan song, and it was held down there because he was uncomfortable traveling at the time. You could sort of see there was always a lawyer attached to a wealthy person. John Ben picked a good one, because Talbot obviously understood people. He knew how to get people to do stuff. He knew how the world worked. John

Ben was busy doing his thing, and he wanted somebody to take care of his business, and Talbot was a great pick for that. He was also a wonderful guy to spend time with.

There was a dinner one night at the Sheraton I think I'll remember for the rest of my life. He had not only our table enthralled, he had the whole dining room listening to him tell stories. It was really something else. That was Talbot, and he was the architect of this. He really could have answered the question of why the Trust was set up. But as far as I know, if it's other than what I said, he took it with him to his grave.

Chick Stout was a business guy, worked in newspapers, was extremely smart and detail oriented. If there was a question you were worried about somebody asking at a board meeting to the lawyers, Chick was the guy who asked it. That was the kind of guy he was. He was always gracious, also extremely smart, saw a very clear view of the world. He was a very smart businessman and really had a voice in the philanthropic side and he really wanted the business aspects of journalism to be part of the trust giving. He wanted it to be studied, and in fact for years he was really upset with Syracuse because they'd given them a lot of money, seven-figure grant, and it was stipulated that the business aspects of journalism would be part of the research that would be done under the auspices of this grant. They never seemed to get around to it. Frankly, they should have done more on the business side; they wouldn't be in trouble like they are today. Anyway, Chick was a good guy and really kept the group grounded.

Ralph was just an amazing person in his own right. In a way, he was a fish out of water. He was not a business guy. He was really a religious man. I mean, without throwing terms around, he was a Baptist. He was a devout Baptist. He saw the world through

that lens. He would try to enforce his values sometimes, and I think that created a little discomfort in the group.

One of the things that was in the will was a request that the Trust build a memorial building in Pulaski, and the building was going to be sort of a Civic Center/library. Ralph wanted to put a covenant in the deed when the building was transferred to the village that there could be no dancing, because he didn't believe in dancing with women. There was a long discussion at the board level on that, I have to say. But that's an example of the kind of stuff that he did.

The story was that John Ben was interested in his genealogy probably because he was looking for somebody to leave money to, and he finds Ralph. He sort of bumps into him, tracking their joint genealogy down, and he makes a deal with Ralph. The deal is, "I want someone to move up to my old hometown and take care of my charitable business up there, and the quid pro quo will be..." There might have been some cash payments during John Ben's life to compensate Ralph, and he bought Ralph a house up there. "But you'll become the trustee of this trust when I die." So Ralph accepts that responsibility and moves up there.

Shortly after, or some point after that, John Ben meets Vernon, who was really who he was looking for, I think. Not that Ralph is a bad guy. I just think that from what I knew—and I never knew John Ben, but I certainly feel like I knew him well—Vernon is who he was looking for. So he sort of brings Vernon on as Ralph's successor, and Vernon agrees and really sort of uproots his life. I think he was a tenured professor in Nebraska and he moves to Syracuse University because he can live in the northeastern suburbs, I guess, and be within fifty miles of Pulaski.

So that's sort of that initial crew. They got along. They were respectful of each other.

They made their accommodations. They didn't let Ralph put the restriction on dancing. "Come on, Ralph, there are other people. Everyone's not a Baptist, you know, so there's nothing immoral with this kind of stuff."

You probably should hear something about the advisors to the trust, too, because that's an interesting cast of characters. I have to talk about my boss, who was a fellow named Pat Tanyan. He was the partner on the account, and I was the associate up until, I guess, the early eighties. He was just a brilliant guy, probably the smartest person of any kind that I've ever met in my life. He really saw things very clearly, and saw issues very clearly. He saw an issue actually with the Trust when it was going for its exemption, and protected people very well. He certainly had the respect of the trustees, and he was great to be with. He got them involved in probably the most interesting and scary project of their existence. I don't know if anyone else talked about the *Dial* magazine.

No.

It was really interesting. It was actually a loan that they made to WNET, Channel 13, the public television affiliate in New York—to start a magazine. It actually was, I think, the second largest magazine startup in the history of the industry. It was really a big deal, because it was not just New York, it was actually a consortium of the public TV station New York and Chicago, L.A., D.C., and Boston, so it was millions of people. The idea was they would produce this magazine based upon the content of public television, give it to the members as part of their membership, and then sell advertising in it.

Pat had met somebody who said, "Wouldn't you want to try this?" So they thought, "Gee, this is a pretty good deal." I

remember Chick Stout thought it was not such a good deal. Allen thought it was a good deal. They decided to do it, but to them it was a lot of money. It was sort of a revolving loan that ultimately would be paid back by WNET, and it was a couple million bucks with the interest. It was a complete disaster, an utterly complete disaster. Everything went wrong. The publisher died of cancer two weeks after the launch. The magazine industry was upset because they thought it was a not-for-profit entity competing with them. It nearly caused the bankruptcy of Channel 13 in New York. It was just awful, awful, awful, awful. It went on forever and was really a big part of the Trust's life for many, many years. Pat actually left the law and died shortly after that.

But there also was a long line of real smart characters who worked for the bank, because the Irving Trust was really a very sort of interesting, quirky place. There was a guy named Jack Vincenz [phonetic], who was the original trust officer that worked on the estate and carried over to the Trust. There was a woman named Janet Hunt, who went on to be one of the highest ranking women in the banking industry in New York. She was head of the Trust Division of the bank, also was very smart.

There was a guy named Henry McKenzie, who was an incredibly sweet man but also very smart, quintessentially New York, and wonderfully practical and service oriented. Up until Ken Houghton and his whole crew, they've really been very well served by that institution and Bank of New York, the successor institution. They've really done a great job.

I have to say, too, overall, this is one of the best-run organizations of its type that I've ever seen in my life. These guys are such good stewards of their money. They're so careful. They're cheap with themselves and they're

generous with their grantees. They've really done a really good job. I think the bank was part of that as well.

*In that we're talking about the banks and money management, given that this large sum of money is deposited at a bank or someplace that can manage all of the assets, how has the money been handled over the years and what changes have happened with that?*

Well, on the Trust side, it's been pretty much the same, because the bank is the fiscal trustee. It's in charge of managing the money. The individual trustees are involved in it, but the bank assigns an investment officer. The investment officer and the other trustees agree on an investment philosophy and an asset allocation and a strategy, and then the bank proposes individual investments. The individual trustees either agree or disagree, but they generally defer to the bank.

Various trustees have been more involved in that than others. Chick Stout had very strong views about things, for example, but everybody's been active. Allen Malcolm's been very active. Allen's a very good trustee, because he has a view and he's probably a little bit more conservative than some of the bank investment people. I think his views have paid off certainly recently. By and large, they've done very well.

The Foundation has a much freer hand because it's not tied to the bank under the terms of the will, so they manage money. Initially they managed it just like the Trust did; they hired the Bank of New York. Several years ago, they diversified managers, essentially, and they've been much more proactive, because they can in terms of finding managers they think are appropriate.

Here again, everything is by the book. To develop an investment philosophy and

a mission statement and then try and find managers that fulfill that, just luckily—and this really gets down to the current generation of managers—they’ve really managed to breed in the family a good group of people who had the skills to do this.

Actually, Vernon, when he wasn’t sure how his son would turn out, how Jonathan would turn out, because he was young, actually went to his nephew and said, “We have the resources through this thing called the family trust.” I don’t know if you’ve heard about that, where family members can get money, and we have a system of giving it away. We have control to do special projects. “We would want to make sure that we had somebody in the family who could really understand money and the law in this area and how it worked out.”

So that nephew, David Snow, wound up as a CPA and a lawyer and practicing in the not-for-profit world, and he’s a partner in a good firm in Milwaukee. Jonathan turned out to be a very solid businessman, so the two of them are really taking the lead in terms of thinking about investments, with Allen on the board of the Foundation providing the perspective and the gray hairs. They’ve done quite well. Since I’ve been off the account, I really haven’t followed them the past year or so, but they had done extremely well picking managers and doing their asset allocation. It’s a process, depending upon which entity you’re talking about.

*Can you talk about who have been the various successors over the years?*

Sure. Charlie Murray worked in the newspapers, very sweet man. There was Bill Elwood, who’s a lawyer from Cedar Rapids. I guess he had done some work for Speidel, so he found his way on the board. He was

a smart guy and really was, in essence, an outside director. He never was a part of the management.

Who else was there? Back in the old days, I can’t think of anybody else. Rollie Melton was an outside director at that time as well and then later on became president of the Foundation and a trustee of the Trust, and is simply one of my favorite people who ever existed.

Those are the people who have served. I’d have to begin by talking about the family trustee, because it was decided early that the way this thing was set up if there’s no family trustee, the Memorial Trust ends. It’s a very interesting arrangement. This is sort of a hot issue in foundations periodically, whether the Foundation should spend down and go out of business or whether they should go on forever. John Ben sort of compromised. What he did was, he said “Well, I’m going to take a term, and the term will last until the last to die of these five relatives of mine.” It’s basically Jonathan and David’s generation, people who are now in their forties. So it’s Jonathan and David and three of their cousins. When the last of those people dies, the Memorial Trust goes out of business.

The other way it goes out of business is if there’s no family trustee at the Memorial Trust. There are conditions listed in the will about who can be the family trustee. He has to be named Snow. You can adopt somebody in; he has to be male. People thought that was an attempt to avoid getting Ralph’s daughter as a trustee. That was at least the scuttlebutt.

So it was important to groom somebody from the family and always have in mind who that could be. Now, the family trustee could appoint his successor, but if that appointment failed, he didn’t make it or the person died before him or something like that, then the other trustees could get together and pick



another Snow to be trustee. They wanted to make sure that it was the right sort of person. So, hence, David being trained. The practice grew up of saying, well, gee, anybody who might wind up as a possible successor to serve on the Trust maybe could sort of learn the business by being on the board of the Foundation. So the board of the Foundation became sort of a training ground for possible successor trustees. That was pretty much how it operated. Jonathan was put on the board there. David did time on the board there. Now I guess he's Jonathan's successor as trustee, should something happen to Jonathan. Emelie Williams was on the board of the Foundation before she became a trustee. So that's essentially how it's used. Nepotism is endemic in the foundation business. I would say it is controversial, but it's so widespread that you almost can't say it's controversial. It's just accepted. I think people have been good about appointing family members who were, one, accepted by the group and, two, have something to contribute. If they don't have something to contribute, they're not appointed. They might be discussed, but they're not appointed.

People can bring different things. There was a great epiphany several years before I resigned as counsel, when somebody said, "Gee, we come to these meetings..." They did them for three days and they tried to get them down to two days to save money. They said, "Gee, we spend all this time talking about the money and the investments. Not that it isn't important and we all should know about it, but we really should be focusing more on where we give it. We should be talking about that."

Somebody from the business side of the world doesn't necessarily make the best trustee or board member. A big part of what the Foundation does, certainly, is grassroots community philanthropy, and

having somebody who understands how it works and works in that field is important. So someone like Allen's daughter, Valerie [MacFie], is really valuable, because that's been her life. She doesn't know anything about stocks and bonds, but there are plenty of people who do.

I think they've handled that well. I won't say there's no politics or haven't been politics at certain times, but they've largely gotten over it. Recently they've brought on some people who really are outside the group. They've brought on Angus [Burton].

He's a money manager, but he's just a good guy, and he has very broad interest in the world. He happens to be a relative of Allen, but that's almost an accident, and that's not why he was picked. I don't think Allen knew him well, frankly. I think he just said, "He'd be a good guy." They just brought somebody on from the Syracuse community, which makes a lot of sense. Jonathan is the family trustee and he's trapped up there, but he's not in the community, and to have somebody who is connected, I think, is a very smart thing. As I was getting out of the relationship, there was a lot of talk about who would be the best sort of person, and just generally a lot of focus on best practices.

They did an accounting in the Trust about four or five years ago. A charitable trust has to go to court and present an incredibly detailed account down to the penny of what they've spent. This is what we've collected, how we invested it, and everything. Then the attorney general comes in and essentially audits it, and then if the attorney general says okay, then the court approves it and the trustees no longer have any legal responsibility for that part of their administration. It's sort of given a clean bill of health.

The Attorney General's Office starts talking to me about this, and he couldn't believe how



clean these people were. [laughs] It was just unbelievable. He said, "Gee, it keeps growing, but they keep giving all this money away. Gee, maybe they're warehousing money."

I said, "Wait a minute. They're giving away way more than they have to. Just leave these people alone." Their expense ratios are unbelievably low. So they really do it right.

*For the Foundation and the Trust, in that they're based in New York, are they subject to New York laws then when it comes to management of a trust and a foundation?*

They are, absolutely.

*Because they give money beyond New York, does it affect what laws they're subject to?*

No. They don't do enough business to be considered doing business in Nevada. I guess you could argue, I suppose if the Foundation acted like the Trust, maybe that could do that and create a registration requirement. We never felt that the Trust had that responsibility or that obligation.

Actually, you know, New York is probably a good place to be—well, good or bad, depending on your point of view—to be organized for charity, because it has a relatively active Attorney General's Office in terms of regulating charities. Nevada, I think, probably doesn't. Most states don't. Pennsylvania and New York are the most rigorous. But essentially they're also just grant writing. They're writing a check. They're not doing programs. They're not actively doing business. They're not raising money. That would be a whole different thing.

*How involved have you been with the grant-making process and the decisions that have been made on grants?*

Only on the compliance level: "Is this something we can do?" That kind of thing. I did serve on the board very briefly, and they were sort of at a stalemate—not a stalemate. They'd come to a point where they couldn't decide who should fill a seat, and they wanted to fill the seat, so they said, "Will you do it?" Ultimately, Jonathan got old enough to serve, and I resigned and he went on.

*Do you remember how long that period of time was that you were on the Foundation board?*

Two or three years at most.

*What time period was this?*

Oh, gee, how old is Jonathan now? He's in his forties, so it had to be twenty-five years ago.

*Do you have any memories of that time in terms of what sort of grants the Foundation was giving or anything like that?*

That's been fairly consistent over the years, if you just go back and look at all the grants. They also keep meticulous records. They're unbelievable. The family trust, I think, taught them how to do it. Ralph set that up in a very sound way, pre-computers. They have to give away a relatively small amount of income to a class of beneficiaries, which is in the hundreds, and they keep very detailed records on who's in that class. It's descendants of John Ben Snow's grandfather.

They brought that penchant for databases over to the Foundation and the Memorial Trust. I'm not sure what software they use now, but they can pretty much tell you how much they've given an area, in a program interest and everything else. So they're really very good at that. I don't think during

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my time there was anything that was at all extraordinary.

*Is there anything that you would like to include in our interview today?*

I miss them. I look forward to their Christmas cards and their Christmas letters. They're good people. I got out because I'm just too heavily engaged in my life here. Actually, I tried to get out when I quit practicing law in 1992. At the time, I guess Rollie and Allen and Vernon were the trustees of the Trust, and they said, "We don't care what you do when we're gone, but you have to stay. As long as one of us at least is here, you have to stay on." That's what they told me. [laughs]

And I told Allen, I said, "I just give up. I can't outlast you." So I finally got off a couple years ago. They're a good group. They're doing good stuff. I think it's very smart they're doing this.



## ANN SCANLON

*Allison Tracy: Can you tell me a little bit about where you were born, your parents, and your early childhood?*

Ann Scanlon: My parents were both individuals who grew up in Connecticut, one in southern Connecticut and one in northern Connecticut, and moved to the Albany, New York area before I was born. I was born in Albany. We lived in a community across the river from Albany called Rensselaer, where I started school. In the middle of my first year of elementary school, my father purchased an insurance agency in a town called Herkimer, New York, which is about seventy-five miles from Albany. We made the move to Herkimer at that time, and I lived there until I graduated from high school.

After I graduated from high school, I became a student at Syracuse University, where I completed my bachelor's degree and my master's degree. For the following four years, I taught high school social studies in a community in Westchester County, just to the west of White Plains, New York. At the end of

the four years, I decided I wanted to pursue something different in the world of teaching. After a year hiatus of doing different kinds of things, I moved to Auburn, New York, where I taught at the community college that was located there, now known as Cayuga Community College.

After two years, I left Cayuga and went back to Syracuse University to complete a Ph.D., and in the meantime also took a part-time teaching job at the State University of New York at Cortland. I also did adjunct teaching at Syracuse University.

Late in the 1980s, Vernon Snow, who was president of the Snow Foundation at that time and also a professor of history at Syracuse University, asked if I would join him in putting together a course in the history of philanthropy. We put that together and taught it for a five-year period until the time of his retirement in the middle 1990s.

At the same time, I had continued teaching at the State University of New York at Cortland, and Vernon had asked me if I would be interested in coming to work for the

Snow Foundation. He was preparing to retire from the university and wanted more time to be able to travel and research and perhaps go away for the winter. So in June of 1991, at the end of the month, I went to work for the Snow Foundation on a part-time basis.

By 1995, I was really working there not full-time, but I would say on a three-quarter-time basis, moving from an untitled position to becoming the program officer of the Foundation. That was the beginning of my connections with the Foundation, and I've continued on there ever since.

*My goodness, your memory is quite impressive.*

Disease of being an historian. You need to remember the order of things. [laughter]

*Can you tell me a little bit about what the Central New York area is like geographically and culturally?*

The area's comprised primarily of small towns, Albany being the largest to the east and Syracuse being the largest to the west--the metropolitan areas of those are probably 100,000 to 150,000 people. The Mohawk River runs through that general area as does the site for the building of the Erie Canal in the early nineteenth century. The Erie Canal was followed by the building of what became the New York Central Railroad by mid-century. It was an area that, until the late 1960s, had a fairly large industrial base of small businesses—a lot of textile factories and clothing manufacturers. Amsterdam had rug making. Utica, Herkimer, and those areas also had factories that manufactured furniture, particularly furniture for businesses. In a small community known as Ilion, which is slightly to the east of Utica and west of Herkimer, where I grew up, was the site of

Remington Arms—a gun manufacturer that still exists to this day. It's one of the few manufacturing plants that's still there. There was also the beginning of the typewriting industry, with what was called Remington Typewriter, started by a related family, and that existed until probably the 1970s. It was bought out by a computer operation and eventually became part of IBM. That factory has since been closed.

Culturally, the area is quite mixed. It was a site for a great deal of immigration. The community in which I grew up had people who were of Slavic background, German background, Italian, Irish—a total mix of people. That was pretty much true of the whole valley area. They have certainly come upon economic hard times, even before the current crisis, but they have managed to attract or made the decision to build community colleges in order to have some two-year schools that are located in the area. So, there is a cultural mix. Utica, particularly, has a very large and very good art institute and its own symphony. It's small in scale, but it's there and it's thriving. So there is an interesting cultural mix in that area. My ancestry was German and Irish. My great-grandparents came from Ireland and Germany in the 1840s and another set of my grandparents came from Ireland in the 1890s.

*Can you talk to me a little bit more about the history of philanthropy class you taught with Vernon? Was this specific to New York or in general?*

No, it was a general history of philanthropy. What is called the Independent Sector, which has membership of foundations along with the foundations that are in the Council on Foundations, became interested in the 1980s in having more information go out about

philanthropy in general, and they offered some grants of money to individuals who would try to develop courses. NYU and Indiana University were pioneers in doing this. We did just the single course at Syracuse University, but what we did with that was to try to go back, really, to the roots of philanthropy in the Judeo-Christian tradition.

Vernon covered the early period. He had a good background in those areas. He was a British constitutional historian, but he did the period from ancient times up to about the eighteenth century. Then I picked up the eighteenth and nineteenth century and early twentieth century of American philanthropy, and then we worked together on the modern period. We were both engaged in that field at that time.

What we did was to really look at the roots of philanthropy. Vernon, for the third time in his life, read all the way through the Bible to look for historic connections to philanthropy. He did it once as a young man, once when he was a college student and it was required, and this was the third time to look for roots of philanthropy. Then we began to explore the cultural and economic areas. We did focus on the United States. We touched upon what happened in Europe and even Greek traditions, which did not have a strong philanthropic base. Theirs was much more oriented to "You did me a favor, I'll do you a favor," but the other cultures did much more in terms of taking care of the widows, the poor, the children, those who were handicapped in some way or another. Almost all religious traditions took care of those individuals. There's a stream that goes through.

Later on in our course development, we also dealt with Islamic traditions. We were able to explore them and found that there is a strong tradition there for caring for the same

groups within society. The course was offered at both a graduate level and undergraduate level, which is something that Syracuse frequently does. It was a small seminar format, and students had readings for the course. Then we would come in and make our presentations. The students would be with us and discuss what they had read. Each student took a particular charitable institution, individual, or tradition and explored that for their seminar paper.

*Can you tell me a little bit about the transition for you personally from teaching and being in a university setting to becoming a program officer for the Foundation?*

It was a very interesting transition. I really enjoyed teaching, but I enjoyed moving over into this particular field, because it still requires a certain amount of research into the organizations that you're working with as part of the philanthropy. In a sense you can also teach because people come to you seeking grants. If you can't help them out, you can steer them to some other institution that might be able to help them. It was a rather smooth transition. I am somebody who gets up in the morning and really likes to go to work. Every so often it's a little frustrating with people, but generally speaking, it's really something that I have enjoyed now for eighteen years.

*Can we talk a little bit about the difference between the Trust as compared to the Foundation? How are they different?*

The missions or the focus of both organizations are the same. We go across the board in the categories we work in. The principal difference is that the charter of the Foundation, which was chartered in New



York State in 1948, it is defined as working in central and northern New York. It was not specific as to exactly what areas, but it's been pretty much defined as the counties north, south, east, and west of Syracuse, actually about a four- or five-county area and sometimes a stretch into the St. Lawrence Valley area. We'll go up to the river on some of the grants.

The Memorial Trust, with the same focus, works on a more national basis. It generally does its grant making where the trustees happen to be located, because it has been a tradition of the organization, or now two organizations, to have trustees track the grants. We want to know something about them. We want to be able to follow up on them.

Occasionally, a grant will be done totally out of the area, but very often that will be in a case where, for example, Allen [Malcolm] might know somebody in Tennessee and he's worked with them and knows something about the project. We did some grants with the University of Connecticut scholarship programs for graduate students in the business school starting four years ago. This was a case where I knew the person who was the director of the executive business school program, who liked what we were doing at Syracuse University and Maxwell School and said, "Gee, could we possibly have anything like that?"

I said, "We can give it a try," and the board members agreed that this would be an interesting one to try.

*In terms of financially how it's administered, is Foundation money dealt with differently than the Trust money?*

Yes, they are two separate endowments, in a sense. The first endowment, which was

the Foundation, was done when John Ben Snow was alive, and at that time, his personal bankers were at the Irving Trust. They were the ones who handled the money. Then they became Bank of New York, and they had the full accounts. The Trust, when it actually came into existence at the time of John Ben's death, was part of his estate and actually began to function in 1975. At that time the Trust was handled again by the Bank of New York, but totally separate from the Foundation.

The Foundation operates as a corporation. The Trust has a life of ninety-nine years or three generations, so it will really end in the generation of Jonathan and David Snow. When the last member of that generation dies, that will be the end of that.

*Is the Trust just drawing off of a pool of money that will eventually run out?*

They both are. The Trust will eventually run out because of the way the laws are written. It's drawn from English Common Law, which defines its lifetime as three generations or ninety-nine years. The Foundation can go on indefinitely because it's a corporation. What they could do if they wanted to would be to take all the money from the Trust at the time the Trust was ending and pay that with a grant to the Foundation so that that money could be used. But both of them have, in a sense, an endowed fund, and the money that is spent on grant making is drawn from the earnings of those investments.

*For both the Foundation and the Trust, can you talk a little bit about what types of organizations and what type of work are funded?*

They have tried to follow what's usually called donor intent. People know what kinds of things John Ben Snow was interested

in. Can we work in those same areas or areas that would be closely related to it? Both organizations have a heavy focus on education. About 55 percent of the grants each year, not by design, but just by the way it works out, go to educational projects—largely college scholarships or construction on university campuses. At a place like the University of Nevada, they might contribute toward the School of Journalism or medical schools, or that kind of work. They don't work directly with any kind of public schools, except the school in Pulaski, New York, which was John Ben Snow's hometown. We will work with agencies that are working with public schools, but it just becomes too complex to have every school district come to you for money, so they decided that was a better way to go about it.

Another large focus is arts and culture, helping small-town museums and libraries, particularly ones with programs for children. We have one that's called a Shakespeare Festival in the summer in Syracuse, and this involves a small group of children who come to a camp for a week. They learn Shakespeare and they build sets and things, and they become part of a larger outdoor production that the adults do. So we do things that really affect children in that way. We also fund what are called community initiative programs. These might be ones where a library needs to automate its collection system or put in a handicapped-accessible elevator. We do have a category of handicapped accessibility as well—"disabilities" is what we call it.

Because of John Ben Snow's connection with the journalism world through the Speidel newspapers, we do work with journalism schools, particularly scholarship programs, whether it's high school students coming for a program at college or support of a chair in journalism.

The environment is another area that they've moved into in recent times. We look at projects that are targeted at communities, research studies, and actual construction that will benefit the environment.

We do have some that are just designated as youth programs, which are not specifically tied to schools or tied to handicapped accessibility and the like. The categories are fairly diverse: arts, culture, community, education, environment, journalism, disabilities, youth. And they go across the board. These were areas which in one way or another John Ben Snow had supported. He gave to the Boy Scouts and the Girl Scouts, to the YMCAs, educational programs at NYU (where he graduated) and some to Cornell (where some of the board had been students). We try to build on the donor intent, but are not tied specifically to the idea that we're always going to support these kinds of things, because times change and needs change. You don't want to be supporting a buggy-whip factory when we're now driving high-powered cars. They have made adjustments, but retaining the original intent.

The Trust also gives across the board, the same as the Foundation, to education, environment, and the like. The three areas are geographical, and it's wherever the trustees happen to be living at the moment. We have a trustee, obviously, here in Reno. First it had been Rollan Melton and now Emilie Melton Williams. Allen Malcolm was another one of the trustees and has been since it began. He originally lived in New Jersey and then moved to Maryland, so his area is East Coast but moved a little bit in that area. The third trustee is usually the person in Syracuse, or always has been, so it was Vernon Snow and now Jonathan Snow to follow him.

We target those general areas, and people will take responsibility for other ones. Allen

used to do a lot of grant work in the New York City area. If we've already worked with organizations in New York City or in a given area, even if there's not a trustee there, we continue to work with them.

People who run more traditional foundations or traditionally focused ones look sort of startled when you say your board members are all over the country. A big foundation like Rockefeller might have them all over, but few the size of the Snow Foundation and Memorial Trust will.

*During the time that you've been at the Foundation, have there been any big changes in programs or areas that you tend to fund?*

It's stayed pretty constant in terms of the areas of focus. I think the environment came more into play in the last ten years as this has become a concern of every thinking person in the world. So we have done that, but they have been pretty constant in the way they approach things and where they worked and how they worked.

*Can you tell me a little bit about your understanding of John Ben Snow's legacy, for lack of a better word, and his philanthropy?*

I can tell what I know from what I've read about him and what I've been told about him. Allen and Vernon certainly knew him, and there are people in the Pulaski community who remember him. He, from early youth, seemed to have an interest in helping other people. Some of it may have been the religious background that he had, although he was not, I don't think, a practicing religious person in later years. He was religious, but not a churchgoing kind of person.

Also, when he was in New York at New York University, he went to the same Baptist

church as the Rockefellers. He knew John D. Rockefeller Jr. and his son, and apparently was in a bible study group with them and went to their home. Whether they as philanthropists may have had some influence on him isn't known. Vernon Snow always thought so when he wrote the biographies. He could not figure out how John Ben came up with the money to go to New York University, and, although he could never confirm it, he thought quite possibly that the Rockefellers thought him to be a promising young man and gave him some support.

He continued to have an interest in his home community, even when he went to England as an executive for Woolworth. Right through into the 1930s, he was in touch with someone in Pulaski and subscribed to the local newspaper. If he saw that someone had experienced a disaster of one kind or another, foreclosure, a fire, or whatever, he would instruct his bankers to send the money anonymously. They knew who did it, but the people didn't necessarily know who did it.

So whether it was just his nature, whether it was his upbringing at home, whether it was religion, whether it was contact with the Rockefellers, apparently it set him into a pattern of thinking that while he had money, it should be used to help others, not just for his own personal pleasure, although he lived a very nice life.

I've seen the estate that he owned in England. It's now a research facility for a pharmaceutical company, and it said "No Entrance" on it when I went there with a friend of mine, who is British, and two other people who were with us. Rene and I just marched on in, and a man came out and said could he help us. I explained who I was, so he gave us sort of the run of the farm and took us all over. He said he remembered hearing about John Ben Snow and that there was a

picture of his horse that almost won the Grand National up in the local pub. Then he and his wife invited us in for tea, so it became a very pleasant experience. John Ben lived very nicely, but he also took care of others.

*When was this that you were able to go to England and see it?*

1996. I had been many times before, but never to that home. I convinced an English friend to take a ride out there. It was one of those places, like coming from Syracuse to Reno, you almost couldn't get there from here. There was no public transportation that would get you to the community.

I believe Allen has seen the estate, and Jonathan did when he was a small boy, when his father and mother and he were over in England while his father was doing research.

*As the program officer, can you talk to me about your responsibilities and how you manage the Foundation?*

I'm the single employee of the Snow Foundation and Memorial Trust. Many other foundations have multiple individuals who function in that capacity. Generally speaking, what I do is I take inquiries, and review the inquiries. Sometime I have an opportunity to talk to the people and try to help craft the proposal that they're going to make. I'm responsible for seeing if this fits into the mission of the organization—the first step across the board.

As grant applications come in, I'm responsible for reading through the applications. I work on this a lot with Jonathan because there are just the two of us who really work at the Foundation. We review things together and respond to those. Then as the grants come in, we go through and review

them to make sure that everything that we need is there.

For the Foundation, I do a lot of the work. I go out and do site visits where appropriate to see what an organization is doing. We have a reporting system for an organization. Any organization that receives a grant in a given year is required to file either an interim or final report, if the project is done. We, at that time, go through those reports and sometimes do another follow-up visit to see what has happened with them. So it's reviewing materials; it's giving advice; it's going back and following up on the grants—in a sense, due diligence to make sure they've been carried out the way you wanted them to. That's pretty much the area in which I work.

*Realizing that there's no such thing as an average day, what's a typical day like for you?*

I come in, pick up the mail from our mailbox, review the mail, check the e-mails, begin to respond to any correspondence, answer phone calls that have come in, and go through whatever mail has been there and respond to it appropriately. From the beginning of December until the end of April, we're really dealing with inquiries for the coming year's grants and the grant applications. I deal with the review of those and the end-of-the-year reports that organizations are supposed to bring to us.

We'll set aside some days for Jonathan and I, or one of us, to go to Pulaski to the office that's up there to take care of business like filing, because we use that as our archives now. Then in the spring, we might schedule a series of site visits. We do not go out to luncheons and dinners and those kinds of things very often. Many foundations that are trying to raise money will go to all kinds of fundraisers to meet possible donors and the like. Because

we don't have donors to the Foundation, we don't do that. It's been a standard policy to try to reserve as much of the Foundation's and Trust's money as possible in order to be able to do as much grant work as possible.

*In terms of the fiscal year in which you give money, is that July through June?*

The fiscal year runs January to the 31<sup>st</sup> of December, but our grant-making year is actually from about the 15<sup>th</sup> of July through the end of December, so that we can end it with the fiscal year. So we do the grants on a six-month basis. There will be some that carry over occasionally. In the last couple of years, the board decided that they would have what they call out-of-cycle grants, where somebody has an emergency situation or project that needs to be funded before they could possibly have the grant money. They consider a couple of those every year.

Because the grants are done only once a year, the meeting is only once a year, unlike many foundations that meet at least quarterly. It makes it very difficult for somebody who's trying to run a summer program if they're not going to get their money until the 15<sup>th</sup> of July unless they have something to carry them over. So our grant making is pretty much in that six-month period. The Foundation and Memorial Trust do a fair number of matching grants. Those organizations are asked to match with new money between July 1<sup>st</sup> and the first of December, and then the checks can be cut before the end of the fiscal year.

*Can you tell me the average size of a grant, if there is one?*

The Foundation grants usually range somewhere between a few hundred dollars to ten to fifteen thousand dollars. The Memorial

Trust grants will run again from a small amount of money to as much as \$25,000. There will always be exceptions to this. There will be some for the Foundation that go up into the \$50,000 range. For the Memorial Trust, some will be even larger than that.

Two examples: with the Memorial Trust, there's \$50,000 in grants for scholarships to the Pulaski School District that go out every year. In the last ten years, the Foundation actually was supporting two fellowships at the graduate level at the Maxwell School at Syracuse University for students who were doing a master's in public administration with a focus on not-for-profit management. There the Foundation was paying out \$30,000 a year in fellowships, and they decided to work with the university to endow those fellowships rather than to have that much money tied up every year. The Foundation didn't have that kind of money to put into it, so the Memorial Trust did the endowment, and it was 240, 250, and 240,000 dollars each year for three years. The last grant will be paid out this year. So those are extraordinary.

If you go back and look in the background of the Foundation, there's a grant for a million dollars (or for whatever reason \$999,999) to Syracuse University to endow a Chair of Journalism, which is the John Ben Snow Chair. For that one the Memorial Trust made a grant to the Foundation, which made the grant to the university. So those will pop up every so often.

There's one to the Pulaski School District that's \$800, and that is for incentive awards. Years ago the students used to be given some money that would encourage them to go on to school, but we were talking about fifty or seventy-five dollars, and that didn't make much difference. So they decided what they would give a plaque. It's very interesting, because the students are so pleased to get the



plaques and say, "I'm going to hang them up in my room for the rest of my life," and people tell me that their children have done this. So, actually, getting a plaque became more important, for the recognition.

*As a program officer, do you overlook the applications for both the Trust and the Foundation?*

I do both, yes. There is a third organization, too, that is really a private foundation/family trust, which gives grants to blood relatives of the Snow family. What they do is divvy up my salary. They pay something in toward it, and the Memorial Trust pays something in to the Foundation for me to do the work for them.

In the case of Allen and Emelie, they really work only with the Memorial Trust's distribution of money. They're on the board of the Foundation and have oversight on that, but the Foundation money doesn't flow into their regions. In Syracuse the organizations really run together. Many people don't understand that there are two organizations. Some do, some don't. We keep crossing over between the organizations in Syracuse to make grants.

*Are there board members who just service the Foundation, who don't really work on the Trust?*

Yes. There are seven board members for the Foundation. Three of those board members are the trustees of the Trust, and the Foundation has been, traditionally, a training ground for people. They get their feet wet with the Foundation and then they move on to the Trust.

With the Foundation, people have to be elected to the board. They're selected by the

board for that. The trustees can name their successor trustee.

*Could you tell me a little bit about the three families that are associated with the Trust?*

All of them had connections in one way or another to John Ben Snow. Allen's father was an attorney and was one of the original board members. He was affiliated with Irving Trust.

The Snow family is obvious. Those were relatives of John Ben Snow's, so they came to it through his family. The Melton family was not one of the original families. There was a board member from the Speidel chain of newspapers, which was later taken over by Gannett. But Merritt Speidel and John Ben Snow were young men who had known one another, and John Ben invested in the Speidel newspapers and eventually became president of it. So there was always someone from the Speidel chain of newspapers.

Shortly after John Ben's death, Speidel was in the process of selling out, and they were bought by Gannett. At that point they chose someone from the Gannett chain of newspapers to sit on the board, and there was a series of people. Rollan Melton was the last one from that particular group, and by that time the trustees were able to name their successor trustees. So once it became the Melton family, then Emelie became her father's successor when he passed away.

*Can you tell me, was Emelie the first woman to serve on the board for the Trust?*

Yes, and she was for the Foundation as well. There had been a member of the Snow family named Ralph Snow who called himself the Big Snowflake. His daughter didn't want to be on the board; she wanted to be the



successor trustee for the family trust, and that one is written in John Ben Snow's will and estate that it had to be a male member of the Snow family. So she was, I gather (I never met her) annoyed to no end that that was written in there, and actually challenged it, and the court said it was legitimate to do it that way. John Ben could have made the choice to create a line of succession. I think you'd have much more trouble with it now, but it was sort of grandfathered in at that point.

*But nothing like that exists for the Foundation or the Trust.*

No. There are now two women on the board. There's the possibility that there's going to be a third one when someone steps down from the board. Well, there are three, because Marilyn Melton is also on the board. At some point there may be a fourth woman or one who succeeds another person who steps off the board.

*Is it common or uncommon to have board members naming their successors?*

In family foundations, it's probably more common to bring family members in. For the Trust, they apparently just decided upon that, and it wouldn't be uncommon in a Trust for somebody to designate the next person to fill in. They have just done it from family members. Royle Melton was originally his father's successor, and then he stepped aside and Emelie became the person who was to succeed her father.

*Are there specific organizations that either the Trust or the Foundation has funded that stand out in your mind or for which you feel perhaps the money was especially beneficial?*

There have been a couple of grassroots organizations in the Syracuse area that have done phenomenal work. There's one called On Point for College, which was begun by a woman who was a financial officer in a corporation. Her daughter was preparing to go to college, and she was helping her with her grant applications. A young friend of her daughter's said, "Gee, Mrs. D.," (her name is Ginny Donahue), "I wish somebody'd help me with my application."

She said, "Oh, come on. We can do all this together." Then the word went out that Mrs. D. would help you get your application together, and it grew from there. Her own children weren't deprived, if you want to call it that, but she works primarily with inner-city youth in the city of Syracuse, children who grow up and might be able to make it in college but family circumstances, money, and the kind of atmosphere that they live in probably would cause them to never get to college. So she started this program.

They take the money that they have, help the students with the cost of college applications, and steer them through it. She has other counselors who work with her. She gave up her job as a fiscal officer. Together they will make sure that the young people get to college if they don't have transportation. They buy them, especially if they're going to a residential college, a backpack and fill it with school supplies. They give them some money toward their books and give them linens—all the things that a middle-class family could supply to their children but these children's parents could not.

They've now had upwards of a thousand students go through the program in a ten-year period of time. Some of them are now college graduates coming back to help with the program. They have become role models. Our grant to them, the Memorial Trust or

the Foundation, is usually \$25,000 a year. It's amazing what they can do with this. When the students are in college, if they need to come home for vacation but they don't have transportation, some of the volunteers go and pick up a group of them and bring them home. When they graduate, they try to get someone to go to every person's graduation and take the parents with them if the parents are available to go. That's been a real grassroots one that's benefited so many people.

There are a couple of others. There's one in Ithaca called the Family Reading Partnership, which was started by a woman who was a caseworker and realized how in many families, the child had never seen a book before they went to school. Some of the parents were barely literate themselves. She started a program which now deals with adult literacy, as well as children, where they give a book to every child who was born in Thompson County, where the city of Ithaca is. Now it's spread into Cortland County. Every child who's born in a hospital there or a medical facility gets a book at birth.

Then every time they go for a well-child visit or to a clinic every six months, they get another book. It goes through until they go to first grade, and their last book is given to them at first grade. They run the literacy programs and all kinds of interesting little programs as an aside. Again, it's a program that stretches money till it screeches. They are able to do so much to help everybody.

Those are two that stand out where the Foundation has consistently supported them as they've asked for money, and so much good has been done with it. There's also part of the Big Brothers Big Sisters organization that now has high-school-based mentoring, where high school students actually go into the elementary schools and help children seven through twelve years of age. That's another

one that's been very successful. It's a national program.

*When you receive the grant applications, what is included on the application? What sort of information do you need provided to you?*

We have a very brief form that they fill out and then supporting documents. But we need the name of the organization, the date it was incorporated, that they are a recognized 501(C)(3), and when they received that designation. We need the information as to who the responsible party is and who their board members are. We then ask for a brief description of the project that they're undertaking, what the overall cost is, if it's only part of a project that they're doing, and how the money is going to be used.

Traditionally, neither organization has given operational support. We've usually given program support. Because of the needs of organizations, almost all foundations are beginning to move in the direction of giving operational support as well, if it will get somebody over the hump. The question there is always, if you pay a salary or you provide organizations with operational support, if we don't do a grant next year because the Foundation and Trust generally have not made long-running grants, how are you going to fund it next year? Is the program going to collapse if support from the Foundation is pulled back?

They're asked to give a project budget for this and the organizational budget, and an audited financial statement if they're large enough to have had an audit. We ask will they agree to meet the criteria of making reports if they receive a grant?

It's a fairly simple application process, and we ask just for one copy of the application. We very often sit down with people and try to help

them craft the application. If they have two or three programs, we talk with them about what the board would probably be most receptive to.

*Is there an average number of applications that you receive every year?*

I would say it runs a little over a hundred for the Foundation. In our office for the Memorial Trust it's usually a little lower than that—maybe seventy-five. It varies from year to year. This year the numbers were up because of the economic conditions. The unfortunate thing is the applications are up and you'd like to be able to help people, but we're affected by the economy as well.

*Can you talk to me a little bit about who the board members were when you first started?*

Allen Malcolm; his brother, Bruce Malcolm; Vernon Snow. Jonathan Snow became a board member within the year that I first came to the Foundation. He came on the board in 1992. David Snow, Rollan Melton, and Royle Melton were there. Since then, Royle left the board. Emelie succeeded him in 1997. Bruce Malcolm stepped down from the board and retired two years ago. He was replaced on the board by Angus Burton. That was two years ago. Rollan Melton was replaced by Marilyn. But it's been pretty consistent along those lines. And David Snow was also on the board.

*As people have come and gone, has the feel of the board changed?*

Not appreciably. I think people have known what the Foundation is about, what kinds of programs they pursued, and what the attitudes were. I mean, people have different ideas, and not everybody agrees

with everyone else all the time, but it always works out very nicely. There may be a shift in what they support in an organization or they may step back from it over time, but it's been, again, pretty consistent.

*Can you talk to me about how the annual meetings function in terms of the board and what you hope to accomplish over those few days?*

What we really do is to make the decisions that are going to affect grants, the business decisions for the board, and often we review the mission of the Foundation. We do that periodically, as well as for the Trust, deciding whether there needs to be any shift in what we're doing. We discussed a few years ago whether the Foundation should go on in perpetuity or if they wanted to spend it out at any point, and everybody thought they ought to continue in perpetuity.

The board meets once a year. The meetings move to different locations in the country. The pattern has now become going east one year and then west the following year. The first day is the Foundation meetings, which tend to go on for an eight-to-ten-hour period. At that time, they sit down, review what was done the previous year, go over the minutes of the meeting, make any changes that need to be made in that, and review the mission of the Foundation. Many times, particularly if we're in the East, the representatives from the institutions that handle the finances of the Foundation will come in and speak about the year, give projections for the following year, and make recommendations to the full board.

There are some reports from committees. For example, we hear from the Investment Committee. We now have a Grants Committee, which I'll come back to later. We hear from Nominating Committees and

the like. That business will all be taken care of along with old business and new business at that point.

In the 1990s, they decided that perhaps it would be a good idea to have a Grants Committee, a small subset of the board, to go through and review all the grants with me that came in for the Foundation, to make some decisions, and to do site visits while the board members are there. At one time we used to go through every detail of the grants at the board meetings. Now what the Grants Committee does is to make recommendations to the full board, and everything's discussed but probably not in such great detail. Some are eliminated because they don't fit the criteria that we really need. This year the Grants Committee looked seriously at organizations that were providing food, clothing, and shelter for people, because of the nature of the economy.

Then the board, having reviewed the grants, will vote on the grants, and decide whether they want to make them or not. Usually they will agree to whatever the Grants Committee has recommended because they're already aware of what's going on. The Grants Committee are the board members. We'll go through and approve the grants and decide where we're meeting the next year. In the process of all of this, we will also make any changes in the officers for the year.

I'd have to go back and look, but I think around 1995, they decided that there would be term limits for board members, and you would only be able to serve in your position for seven years. You would then step down from that position and someone else would be rotated in. So that's pretty much what we do.

*Is that the same for both the Foundation and the Trust?*

Not in the Trust, because the Trust really doesn't have officers. There are the three individual trustees, plus The Bank of New York, who is the corporate trustee.

*For the Foundation, there are some board members who also serve as officers.*

Every officer is a board member, but not every board member is an officer. We have a president, a vice president, treasurer, and a secretary, who are the officers. So there are three board members who are officers and four members who are members of the board but not officers.

*For the Foundation, who are the current officers?*

David Snow is the president; Jonathan Snow is the vice president and treasurer; and Emelie Williams is the secretary.

*What additional responsibilities do officers have?*

The board members who are officers are really responsible for administration. David Snow has to okay things as the president of the Foundation. As vice president and treasurer, Jonathan really is responsible, along with David, for all the financial areas that have to be cosigned on and on the approvals for those kinds of things. There are three of us who can sign checks. I'm one of them. We have a limit as to the amount of a check one person can sign alone. I am able to do it as well since I am an officer of the corporation, but not a board officer. This was agreed to because all the Foundation payments are made from the Syracuse office and if two signatures are required, there are two authorized signers on sight.

Emelie is responsible for all the correspondence. She takes the minutes of meeting, both for the Foundation and Memorial Trust, and is responsible for getting that information out to us. Valerie Malcolm MacFie is a member of the Grants Committee, so she's responsible for those kinds of things, and then as a general board member, for approval of the business of the Foundation.

*Who's on the Grants Committee?*

Jonathan Snow, Ann Scanlon, Valerie MacFie, and Emelie Williams. That does change from time to time. People do step down. That's by choice. Other people are then appointed. Allen's brother Bruce used to be on the committee while he was on the board. He used to fly into Syracuse from South Carolina. For some of the people it's a long distance journey. This year it happened that both Emelie and Valerie had conflicts, so three of us were there. We had one other person who I'll mention in a minute. We did it by teleconference on Saturday, and everybody had all the grant information beforehand.

The year before last, for the first time, people were elected to the Foundation board rather than having somebody designate a successor. Three candidates were interviewed. They chose Angus Burton. Marion Fish, who was an attorney and a partner in a law firm in Syracuse, became a community representative on the board. There was a feeling that we really ought to have more eyes and ears in the community. She was asked if she would serve on the Grants Committee. She will be coming to the meeting this year, and the idea is ultimately, if someone retires from the board, she would probably be the successor member on the board.

*Does the Grants Committee meet periodically or do they only meet once a year?*

We only meet once a year, but we do a lot of correspondence in between, and the people have all the information beforehand. We do telephone conferences on this. Because we are in Syracuse along with Jonathan, Marion and I are actually people who go out and do a lot of site visiting and the like as we go. This was Marion's first year of doing that because she just came on board last year.

*This is a meeting that occurs, obviously, before the annual meeting?*

Yes. Usually at the very end of April or the beginning of May. This year it was the weekend of May 10<sup>th</sup>. It was a bad weekend because it was Mother's Day and college graduations and things like that. That was part of the problem this year. But by that time, all the grant applications have come in. They're due the first week in April. We get them into a form that everybody can review fairly quickly and ask questions about them. Then we meet.

Last year, we did site visiting on Friday afternoon, Saturday morning, and then met on Saturday afternoon. This year we did most of the site visiting individually and then came together on Friday afternoon. We did a series of site visits and then everybody met, by telephone or in person, on Saturday morning to review everything that had gone on.

*How long does that meeting take on Saturday?*

It will take anywhere from eight in the morning to three in the afternoon. This year when we didn't go out to do site visits in the morning, we started earlier and probably spent four or five hours on it, so we're done early in the afternoon.



*This is going back a little bit, but prior to you coming on as the program officer, was there anyone functioning as you are now for the Foundation?*

No, the board was doing it themselves. They had a number of young people—college students—who came in and worked as secretaries in the office and did general filing and taking telephone calls and the like, but there hadn't been anybody in a position like mine.

*In terms of the offices that you're located at, you work in Syracuse?*

Yes. It's a combination commercial and residential building in downtown Syracuse. The first two floors are all commercial offices of one kind or another.

*Where is the Pulaski office located?*

That is located in the Pulaski public building, the office building for the village which the Snows funded. Well, actually, the Memorial Trust gave them the money to build that many years ago, and within that there is one room that's designated as the History Room, but it's also the Snow Foundation headquarters. It's a fireproof room, which is safe for all the files to be left in. A small maintenance fee is given to the community or to the village of Pulaski every year for letting us have that office in the building. That has the village offices, the police department, a huge meeting room for community events, and the library.

*How big is Pulaski?*

Four to five thousand people at the most. It's a very small town, and it's not a rich community. It's heavily dependent

on the fishing industry. There's great river salmon fishing there, and they have a raft of people late in the spring. It slows down in the summer, and then picks up in the fall. It's also an area that gets an enormous amount of snow. The winds come off the eastern end of Lake Ontario, and there's what's known as the Tug Hill Plateau. The wind goes up over it and, of course, cools down and drops all the moisture largely into Pulaski. It's nothing for them to get three feet of snow in two days, so snow-mobiling and those kinds of activities are another tourist attraction for people in that region.

*In terms of the archive that you've maintained, can you tell me what's in that archive and how much material you have?*

There's probably a four-drawer file cabinet that's full of everything that related directly to John Ben Snow and his papers. Some of his possessions are still in Colorado Springs in a museum—things that are on permanent loan to them, like a silver saddle that he had. It was a saddle with large silver medallions on it. They have some of his memorabilia, because he spent so many years in Colorado Springs.

The rest of the room has file cabinets and shelving, and in there are all of the records of all of the grants that have been made by the Foundation or the Memorial Trust. We have winnowed them down so it's the material that directly relates to the grants themselves rather than all the newspaper clippings, programs, and things that have been sent to us over time. There is a history of the Foundation from 1948 to current times, and the Memorial Trust from the time it started to make grants in the 1970s until now. The Snow Family Trust files are also archived there.

*Can you talk to me about other committees?*



There is a Nominating Committee of/for board members, where decisions about the selection of board officers and committees are made. There is a Financial Management Committee. The Financial Management Committee currently is Emelie and Jonathan and Allen, with David as an ex-officio member. The Nominating Committee meets every year. Emelie, Valerie, David, and Jonathan sit on that committee—the younger members of the board.

The president has the option of appointing people to the committees. I did forget, too, that Angus Burton, who is a financial planner and board member, is also on the Investment and Financial Committee.

*Can you tell me about some of the different places where you have held your annual meetings?*

For many, many years when John Ben Snow was alive, they always met in Colorado Springs, which is where he lived for the better part of the last twenty years of his life. He had a ranch there and a place in town as well and lived in the city. So they traditionally met out there. They have generally made the decision to meet someplace where either a board member lives and grant work has been done or an area where grant making has been done over time and they want to go back and oversee what had happened.

In my years with the Foundation and of going to meetings, I first attended the one that was held in Cooperstown, New York, in 1992. I had been working for the Foundation for a full year. I think they went to Charleston the next year. We've been to Colorado Springs a couple of times since 1995. We went to Colonial Williamsburg. These are not in any particular order—

Washington, Savannah, and Salem, South Carolina, where Bruce Malcolm lived, and still lives. We met at the complex where he lived at that time, which is kind of a resort as well as a residential area.

We met in Syracuse in 1998 and then again in 2008, which is the site they try to go every ten years on one of the anniversaries of the Foundation. We met in Reno twice since 1995 and Lake Tahoe on one occasion. We met in Milwaukee, where David Snow lives, and in Summit, New Jersey, when Allen was in that area. I'm trying to think of other places that we went to. Washington, D.C. I may have mentioned that. I think that's most of the recent years.

Again, they've been connected—a board member is close by and will host it or it's been an area where grant work has been done traditionally or it had some connection to John Ben Snow. I know at times they've met in Boston. They met in Las Vegas and in San Francisco one time. I don't know of others that may have been before my time.

*Has there been a particular meeting or location or area that stands out in your mind as being enjoyable or that you liked to go to?*

Sometimes the board members have been reluctant to come to Syracuse because it's not a glitzy kind of place. But we had a particularly good meeting last year because we were able to do a great deal of site visiting. We built an extra day into the meetings. People came early and we divided the board between people who would go north and people who would go south and west. Everybody saw several sites and were able to come back and talk about it. Many times the spouses come along, so we had a group of spouses who went to the meetings last year and went out on the site

visits as well if they so chose. That one went particularly well.

I think everybody has enjoyed the meetings in Reno and Lake Tahoe. The one in Colonial Williamsburg was particularly enjoyable. It was an interesting setting and there was time built in at the end of the meetings where we could really spend time going through Colonial Williamsburg. I was not at the Charleston meeting, but people still speak of what a nice meeting that was.

Also one that I had forgotten, we went to Santa Fe. They had gone to Santa Fe one other time because there were grants that were made in Arizona. That one was particularly popular because of the historic nature of the area and being able to enjoy mountain climbing if you wanted.

*Are social aspects of dinners and being able to just spend time with board members built into the meetings?*

Yes. The design is for people to come together and really spend some time together. It helps the working operations of the Foundation and the Trust as well.

*In your opinion, do you feel that people on the board are close?*

I would say fairly close. They're not living in each others' back pockets and they aren't calling each other except on business every other week or anything like that. But the coming together, it's a group that has known one another over time. For example, when Allen's brother decided to retire from the board, everybody was sad that they weren't going to see Bruce and his wife at the meetings anymore. I think people have kept contact with them over time by e-mail, Christmas

cards, and the like, to see what people are doing.

*We talked about the Trust focusing on three different areas. How long has that been in effect?*

I think probably since the organization was created. The trustees, in a sense, have a responsibility for roughly one-third of the spending of the money, and they look at projects in their own particular areas—the geographic areas in which they lived. They settle on what they're going to do. They have a conference call. The Grants Committee will have a conference call long before this meeting and discuss what projects are coming forward from their particular area. They do an agreement beforehand as to whether or not this can be done, the amount of money that ought to be spent on it, because they, in a sense, have a gentlemen's or gentlemen and ladies' agreement that roughly one-third of the money would be spent by each trustee.

They do come together on some projects like the funding of the fellowships at Syracuse University, which was a large amount of money over a three-year period. Each person, in a sense, contributed one-third to the project itself, which meant their individual grants were a little smaller.

*In that there's this informal agreement that it's broken into thirds, is each member for that area responsible for soliciting organizations, or do you rely on unsolicited grant applications?*

It's a combination of both. I think as the Trust becomes known in different geographic areas, people become aware of them, and then the grants begin to come in that are unsolicited kinds of proposals. But the trustees often look

at something that's going on in their particular area, think it's a particularly worthwhile or feasible kind of project, and then sit down and talk with organizations and say, "Why don't you come to us for a grant of money? We'd like to help you with this particular project." They take both solicited and unsolicited grants, and so does the Foundation.

If, for example, we were to receive a grant application from the Reno area, we would send it out to Emelie for her to handle, because we're not familiar with it, and that comes under her group. We probably more often than not end up with Allen's and Emelie's grants or other trustees' grants. Grant seekers just send them to Syracuse. Allen and Emelie probably get fewer that, in a sense, should go back to the Syracuse area.

*The Foundation focuses on the central New York area.*

Yes.

*The Trust has a national basis. With the two directions, how does it affect overall the reach of the organization?*

In a sense, the Foundation is more for the Syracuse area. We rarely do grants out of that area. The Memorial Trust grants in a way are more competitive for anybody in our area, because they're not going to be competing just with people in the Syracuse area or the central New York area. They're going to be competing with people currently in the Nevada area and in the Maryland area. We have the liberty, in the Syracuse area, to switch grants from Trust to Foundation or vice versa, when we think it's more appropriate. They may be on the very edges of the region that we fund, and it may be better if they were part of the Trust which has the more national reach, or the size of the

grant that they're requesting is much larger than what the Foundation usually covers, so we will make an internal switch over to the Memorial Trust. So, it doesn't really matter in our case which they apply to in Syracuse. We'll make that kind of switch as we go.

*Are the grants typically funding programming aspects of organizations or operational aspects?*

They do capital projects as well, where somebody's putting up a building. There are actually physical structures. They do that rather than just paying salaries, let us say, with an organization for a given year or paying their telephone bills and those kinds of things, which would be operational expenses. When we say program expenses, though, sometimes it does involve the personnel.

For example, there's a group in Syracuse called the Syracuse Children's Chorus. They put on usually five concerts in the course of a given year. They have expenses for the places that they rent, which in a way is operational, but they have to pay those expenses. They have to pay royalties for music that they use. They traditionally have a composer who does chorale music. Different people will commission a piece with them—an original piece that will be performed by the group of children, who range in age from eight to sixteen. There are about two hundred of them in the chorus. Ours has been concert support for them to be able to undertake those kinds of projects.

Occasionally the grants will pay a direct salary. This happened once with the symphony. They had been falling on hard times in the early 1990s. By the late nineties, they were beginning to come back on their feet, but they had dropped the position of educational coordinator and director, who worked with the schools to bring children into

the symphony. They came and asked would the Foundation or Memorial Trust support an educator's position for a period of one year, and asked if they could then come back for a second year. If it worked out well, would they consider to again get that position up and running? In that case, the grant did support a salaried position for an organization, and it was really part of their operational budget for two years. So they do those kinds of things.

We'll do programs with libraries. The Thompsons County Library in Ithaca has had a series where they did special programs for children, like building out a Children's Room in the library. It was interesting and creative, what they had done with that. So they'll focus on those kinds of activities.

With the fellowships, I suppose that's programmatic in that you're giving fellowships, in the case of Maxwell School. They fund two individuals who were in the graduate program in public administration. The Foundation officers or myself never get involved in the selection process of any of this. We may sit in as part of the process and meet the candidates, whether it's the high school scholarships or the college scholarships. But we just are observers in this process, and the organizations make the decisions themselves, because it could be a conflict of interest if we get into picking the individuals.

*Can you talk a little bit more about the information that you require in your grant reports and how involved those reports are?*

Again, they're relatively short. There's a cover sheet that goes with it, which gives all the details of the organization and just a brief summary of the grant. Then we ask for an executive summary, which states that they received the grant of money, and that they had asked for it for this particular purpose. We ask

how that particular project went during the year, did they follow the guidelines that they had laid out for us, and was the money spent as it was supposed to be? If they were going to change the way the money was spent, then did they come back to the Foundation or to the Memorial Trust to seek permission to channel the money in a different direction? We ask them to give us a financial accounting of how the money was spent, on particular parts of the project, and whether or not they've been able to complete it or if this is an interim report. If so, are they going to be finishing up with the next few months? We ask for an explanation sometimes of why they weren't able to carry out the project in the timeframe that was set.

They are not asked to return the money. Most organizations are very good about calling up if they know they're not going to be able to finish it, or they need to change the focus of the project. Then they follow up, as we request, with a letter that states what has happened. Then we can go to the Grants Committee or to the board or to the trustees and say, "Is it okay to allow them to make that kind of a change?"

It's a package of probably about three pages: a cover sheet, an executive summary and then a more detailed summary of how the grant has worked.

*Understanding that the donor intent has remained consistent, have the types of organizations that come to you and ask for money changed over the years?*

To some extent, yes. For a while they put a lot of money into a daycare center up in Pulaski, where they were trying to get that off the ground. A lot of other organizations that were running daycare centers were coming back to redo the kinds of things they had

done before. The Grants Committee decided that we would probably step back from that kind of project at that point, because we were getting repetitive requests from the same organizations. Many of them, at least in the central New York area, are beginning to run into financial troubles. People can't pay to have the children come to daycare. They have a shrinking pool of clients. Several of them have closed. We're looking carefully at this before we make investments in that kind of a project.

We went through a run of people who don't read the guidelines. We're getting individual requests (which seems to have died down over a period of time) but we are not chartered to give money to individuals. Also some for-profit organizations wanted bailouts when times were hard, and we had to say, "We very specifically do not give to for-profits."

There have been scams that have been run all over the country, which I think someone has cracked down on, where someone would run a seminar saying to people, "We can help you get money." It would be individuals and sometimes the for-profit organizations who would go to them. People would pay a couple hundred dollars and they would give them a list of organizations (which they could have found in of the Foundation directories) telling them to ask for money. You've had these coming in, and we're not chartered to give to individuals. We don't give to for-profit organizations.

At one point in the middle nineties, I started calling some of those individuals or businesses and asking where they had gotten their information, because the letters we would get would be identical. They might be coming from western New York, they might be coming from Pennsylvania, and they would have attended these seminars, and this

was a standard form that they were told to send out to people.

We notified, as did many other foundations, the Council on Foundations and the Foundation Center, if they weren't already alerted to it, that these were coming through to us. I think they may have begun to work with the IRS on these kinds of organizations perpetrating scams. Those types of requests seem to have slowed down in the last few years. We only get one or two a year, so someone has put those organizations out of business.

*In terms of what you do for the Foundation, have your responsibilities changed at all over the years?*

My responsibilities have greatly increased over the period of seventeen years. When I came to the Foundation, I came, as I mentioned earlier, at the end of June, 1991. Vernon explained some of the things that had gone on. About three weeks later, he came in the office one morning and said, "Elizabeth," who was his wife, "and I are going on a seven-week trip out into the West. Open all the first-class mail, throw away the junk mail, and take any messages from over the phone that I need to be made aware of. When I call in, tell me what's been going on. Read the files. You'll learn a lot about the Foundation and Memorial Trust by reading the files." Then he marched out the door. Here I was with the Foundation and apparently he decided I was going to know what to do. I didn't get us into any trouble, anyway. [laughs]

*Over that seven-week period?*

Yes. I didn't break the Foundation in any way, shape, or form at that point. So that's the



way I started. So from doing the basic clerical work and reading about the Foundation, it grew and grew and grew in terms of what I was responsible for.

*Are there any memorable responsibilities that were added to you over the years?*

With the creation of the Grants Committee, and becoming one of the original members of the Grants Committee, going to Pulaski to sit in the reviews of the scholarship meetings. Vernon and I had talked about an idea of his of starting a community scholarship program in addition to the traditional purely academic scholarships that were awarded. I was part of the development of that project and then became the person who really shepherded this along with board approval. Because they had for years given scholarships to seniors, it eventually developed into a program that now consists of five scholarships based on academic performance, community service, and a lot of other requirements. We awarded \$10,000 scholarships to five individuals.

In addition to this, they developed this community scholarship program where students interview for the scholarships at the end of their sophomore year of high school. Two are selected. They go to work in the summers for not-for-profit organizations in the community. You can't expect high school students to do it on a purely volunteer basis. They need to earn some money, so they receive a stipend that grows. They work twenty hours the first year, thirty hours the second year, forty hours the next year, and the stipends go up. There's \$6,000 left that's paid out to them as they go to college over the four-year period.

I became the person responsible for shepherding that through the community,

and over time Jonathan and I split the duties. They have awards assemblies in Pulaski, and they like somebody from the Foundation to come up. So he goes to the middle school one, I go to the high school one, and then we reverse it the following year. Those were all things that Vernon used to do that he was happy to pass on to somebody else. It was the everyday and the face in the community kind of things that I began to do much more of over time.

*How much contact do you have with the various board members?*

Jonathan and I have contact virtually every day. He works for his corporate job out of his home, so he's in the Syracuse area. He has to travel some of the time, but not very often anymore. He did when he first came east. With the rest of the board members, it's pretty much when they call up with questions or we have questions for them, and it's contact in that respect. Pretty much we run the operation in Syracuse and they keep in touch with us, and then we're all together for the annual meeting.

*What is it like working with Jonathan more closely?*

It has been a wonderful experience, both working with his father and working with him—with Vernon and with Jonathan. It was a very smooth transition when he had to take over for his father when his father died. It just was very pleasant. He's a good corporate manager. He knows how to do team work.

When we'd do the list of grants that come have in and we review what people are asking for, we make up a list of all the grant applications that we've received. He sits down with his and I sit down with mine, and we



have what we call the A, B, and C categories. A, we think it's really great and we think they should be fully funded. That's what we're going to recommend maybe to the Grants Committee. B, it should be partially funded or we might possibly hold it over. Then we get down to C, and that's really questionable. It's interesting how close our decisions are on all of this. Vernon and I used to do it, too, so you have sort of a mindset, I think. We don't always agree perfectly, and we discuss things and go from there, but it's been a really nice experience working with him.

*Can you tell me a little bit more about what Vernon Snow was like?*

He was, in terms of his profession, a historian, with a special focus on British constitutional history and biography. He was kind of a low-key individual –very bright, very well read, very knowledgeable, and possessed of a sense of humor. I only saw him lose his temper twice, and it wasn't at me either time that he lost it. I think he was a very kind person. He was very considerate of others, and had a mind that was not just focused on his British constitutional history, but was able to look at situations and say, "Well, what sort of creative solutions could we come up with for that kind of problem? How could we better that particular thing?"

The community service scholarships were a way of rendering service to the community. Those were the days when Bill Clinton was really pushing community service. National programs also give young people an opportunity and make them more oriented to giving something back to other individuals. He had that kind of a mind that he could look at the broad picture and come up with some creative solutions for things or at least creative suggestions.

*What year did Vernon Snow die?*

1998. Jonathan became his father's successor.

*How long has David been on the board?*

He was on the board in the 1980s, so he's been on a long time. He's older than Jonathan and he was shepherded in to begin with to learn the business and things. Then Jonathan came on in 1992.

I'd have to look at the list to see exactly when every board member came on. I did that at one time when Vernon was doing the new edition of the JBS book. We went back through and I went back through all the records and things to make sure we got people on the board at the right time and who they were.

*Going back to this idea of the history of philanthropy, where would you place the John Ben Snow Foundation in that?*

I think it really came out of a nineteenth-century American tradition of creating organizations that were designed to help individuals. Some of them would be voluntary organizations that weren't investing money but were investing time, whether it was volunteer fire companies or volunteer police forces. Some were charitable institutions that collected money to help particular situations, whether it was a crisis of a plague or an influenza epidemic or something like that where they were helping to start charitable hospitals.

It really grew out of a tradition, I think, that was post-Civil War in America, where people amassed enormous amounts of capital. The Rockefellers and the Carnegies are an example of that. They did have at least some kind of a background that encouraged them to share their wealth with others, even though

they were considered to be robber barons. Most of those people, I think, did have roots in some kind of religious tradition that was taught to them. In the case of the Rockefellers or the Carnegies, it would be a Christian tradition. In the case of Schiff and some of the bankers, and the Sears, Roebuck Foundation, they had their roots in Judaism, which, again, had tithing and encouraged charitable work with individuals.

Toward the end of the nineteenth century, people began looking at this and deciding that small amounts of individual contributions at the time of a crisis are not going to solve problems. What we really need to do is take a more scientific look at the problems of society and maybe organize better to create organizations that will address issues as they're growing up. Look at the roots rather than just resolving the problem when it occurs. I think that was the tradition where John Ben Snow came from, and the Snow Foundation is really the more American approach to giving and foundations.

You find private foundations in this country and organizations for it that you don't find in Europe or China or Japan, where government organizations are the ones that try to address the issues. You don't have the individual and the private philanthropy that we get in the United States, whether it was because of the growth of industrialism and capitalism in the United States, or going back to De Tocqueville, who saw Americans as people who came together to resolve problems as a group in society rather than relying on government. All of that probably played into it, and the amassing of tremendous amounts of capital. At the end of the nineteenth century, people were so rich that they perhaps felt they ought to share, plus there were government pressures on organizations and individuals who were

amassing tremendous amounts of capital. I suppose, too, the introduction of the idea of income tax in the United States, particularly when the government said, "Well, if you give things to charitable organizations, that part of it won't be taxed," may have encouraged some people to look like successful and good people in society and give it away rather than give it to the government.

*In terms of the governing law of nonprofits and foundations and the laws that you need to follow, is that governed by New York State?*

It's really governed by the federal government.

*Can you talk a little bit about the laws that govern foundations?*

There are restrictions on any kind of political activities that you'll engage in, lobbying and the like, and support of organizations that are engaged in lobbying and trying to put forth a particular point of view or advance a particular cause. We have to be very careful along those lines. You're pretty much restricted on contributions to political organizations to support a particular candidate or a particular political philosophy. It's the IRS laws that restrict you on giving to an organization that is a money-making organization or to an individual unless you're chartered in that particular way. There are sort of general ones. There are state laws, but they fall pretty much under the same rubric as the federal laws.

*Are there any state laws that govern the responsibility of board members and what they must provide to the organization?*

There are some. There are restrictive laws in terms of things that are not prohibited,

like paying board members to serve on a board; corporate boards often do that. They've tightened down over time as to what services are paid for. Our board members are not paid except for direct services rendered. They will be reimbursed for coming to the annual meeting. Officers receive a small stipend, but the other board members are not paid for the service that they render except for the attendance at these meetings and the expenses that they would incur. For example working with an organization in their particular area where they've had to send out things—postage and the like. That sort of thing would be something that they would be compensated for.

Something that came to mind to me with board members, too, are laws that restrict you in terms of conflict of interest. If you sit on a board of a not-for-profit organization, and that board is now going to come and ask for money from the Snow Foundation or from the Memorial Trust, that the person really needs to recuse themselves from the decision that is made by the Snow organizations. You're restricted in that respect.

We have a general policy, not written in stone, that we just don't serve on the boards of other organizations, generally speaking. I just had a request the other day from an historical organization in the Syracuse area that wanted to know if I would consider coming on their board. I said that our general policy is that we don't do that, because you're going to come to us for money, and it's the perception that people have of what's going on.

The board also tries to be very careful—they're not restricted by law—of the perceptions that people would have if we stayed in the most expensive hotels in our meeting places, had the most expensive dinners, and went out to a lot of social activities and then billed that as a board meeting. We're pretty careful about doing that kind of thing.

There are questions that are raised, and the federal government has been looking over the last few years at requiring a higher payout based on your distribution, which goes on a three-year rolling average. The federal government has talked now about insisting that organizations give a higher percentage or a fixed percentage to minority organizations, and I don't think that one's going to fly. I think they've begun to back off on that kind of request because the issue comes up of donor intent. Are you going to say that John Ben Snow should have been required to give to XYZ organization because the federal government said that, when that wasn't his intent at all?

*In terms of the money that you have that you're drawing off of for both the Foundation and the Trust, are you governed in terms of the percentage that you're allowed to use, for example, on your yearly meeting?*

There's a percentage of legitimate expenses that can be used, whether it's for salary, office rentals, the Foundation meetings and the like. What are legitimate expenses that are required in order to have the organization function successfully? In terms of the payouts, there's a minimum payout that the organization must make. You can take out the legitimate expenses first. Then you can figure what your payout is going to be.

*Have you set up the Trust in such a way that that money is tax-exempt indefinitely or does it only become tax-exempt once you've actually distributed it to an organization?*

You calculate what you need to pay out in a given year, and you estimate what the income of the organization is going to be for the year, and you make the payout. If you don't make a

full enough payout, there is an excise tax that is levied by the federal government. It's usually around 1 percent. Most years the Foundation and the Memorial Trust pay out as much as they need to, and sometimes even a little more.

*So they don't have to worry about those issues.*

No, very rarely. I think it was the year before last they paid the excise tax. Then when the federal government recalculated, they gave back the tax saying that it wasn't necessary, because the expenses and the payouts were sufficient to cover that.

*Do you have any good stories of the board members that you've worked with?*

Rollan Melton was one of my favorite board members. I liked all the rest of the people, but he, besides Vernon, was probably the first person I met on the board. They had a board meeting in 1992 in Cooperstown, New York, not too far from Syracuse. Vernon said he thought I should come down for the Foundation meeting and meet the other board members.

So I went, and I was sitting outside the conference room in the basement of the Otesaga Hotel, which is a big resort hotel there, waiting because they were obviously in the middle of business, and Rollie was sitting where he could see me.

He was a big man. He had played football when he was in college at University of Nevada. He kind of ambled out, and he said, "You must be Ann. I'm Rollie Melton."

I said, "How do you do?"

He said, "Come on in."

I said, "Oh, you're in the middle of your meeting."

He said, "That's all right," and he picked up the chair and went in. Then I ate lunch with

him and with Royle that day because we were all sitting at the tables out on the terrace. So he was the first board member I really got to know.

Any organization or group of people I was with, unless somebody invited me to, I always called them Mr. and Ms. or Dr. or whatever it happened to be. He had a distinctive voice, and we got talking that day. He was interested in the history of boxing. He was trying to write a book on it. I tried to get some materials together for him that would be useful, because he was interested in the history of boxing in the West. So we used to talk periodically.

He called up the office one day and I said, "Oh, hi, Mr. Melton."

He said to me, "You're very well brought up to call everybody Mr. and Mrs." Now, we were not that far apart in age; maybe ten, fifteen years, something. He said, "Cut the crap. You can just call me Rollie." [laughs] I mean he was that kind of an individual. And if he came in, he'd meet you and shake hands with you and say, "Hi, I'm Rollie Melton, and I'm glad to meet you, Alice." There was no "Mr. Melton" or anything like that. He was just one of those very laidback individuals.

He was also the kind of person who, when there were disagreements on grants and things between board members, usually would sit there and come up very calmly with some way that we could quickly resolve this so it would be satisfactory to everyone in the place.

I also learned that, like all newspapermen, you shouldn't tell them something you didn't want them to publish. When Vernon died, the Malcolms and the Meltons had gone to Cooperstown from Syracuse. They wanted to go back and see some of the sites they hadn't seen before. So they were there. Vernon died two days after the meetings ended. They came back and Rollie was going to give the eulogy at Vernon's funeral. So he said, "Would you

come down to the office and tell me your side of this? We know what the board members all knew of him, but different things that you knew about him.”

So we were talking, and I said jokingly—not jokingly but seriously, I said, “One thing Vernon did not like was the opera. When we would get requests from the opera company for money, he’d say, ‘I don’t really want to fund that. They’ll give us tickets, and I’ll have to go.’” He wasn’t really against the opera and things, which his wife said was really true. So I had told that story.

Also, Vernon had been in the army in World War II. He was very young. He went right out of high school, and he was in the Battle of Bulge when he was only twenty years old. Then he was sent with units that opened up the concentration camps, which had given him a very different perspective on the world. When Schindler’s List came out, he refused to go see it. His wife asked me if I wanted to go, and I said, “I’m not so sure.” Vernon said he had seen it live and that was enough. In any case, they had not known about the concentration camp part of it or even which portion of the battles he had been in over there.

So I was telling those stories, and when Rollie gave the eulogy the next day or two days later, he talked about Vernon not liking the opera. We had the general counsel for the Foundation and another friend of Vernon’s who was the university librarian, and they were both sound supporters of all kinds of opera projects. They weren’t voting for the Snow Foundation. I said, “I better learn not to tell that story anywhere else.” [laughs]

Then some years later I met a fellow in Syracuse by the name of Steve Harrison. When Jonathan and I were meeting with him, he was a development officer for one of the hospitals, and he said to us, “How is Rollie Melton?”

We said, “How do you know Rollie Melton?” Because we just knew this man in Syracuse.

“Well,” he said, “I came from Reno, and I was on the board at the University of Nevada with him,” in some capacity, so he said he had a story. They were having lunch together and he was telling how he had been born in December of 1941, and his mother and father used to say of Steve that if he were born on the seventh of December, whether he was a boy or a girl, they would have named him Pearl Harbor Harrison. He was telling the story, and he said a couple of weeks later, in Rollie’s column that he used to do in the Reno Journal, he told the story of Pearl Harbor Harrison.

I said, “Well, we both learned. If you don’t want a reporter to publish something, don’t tell him.” [laughs]

He was just a very interesting individual to have on the board, and, as I say, always could resolve conflicts that came up. There weren’t many of them, but people would have different opinions on a grant or a policy and you’d almost see his mind working, “How can we resolve this?”

*You said that there are not often conflicts, but is there a specific issue or an organization that you ever remember just two board members digging in about?*

They weren’t ever really opposing one another, but they would try to figure out how to resolve a problem. There was a large grant of money offered to an eastern university, \$250,000, and they said if that organization would raise \$250,000, they would match the money. There were three colleges in New York City that they made that offer to. They’d been doing grant work with them for scholarships for a number of years, and wanted, really,



to end the programs so that they could distribute money elsewhere. “If we give you a big grant of money, then you can continue the program.”

So two of them said, “Fine.” One of them had it matched in no time at all. They went to their alums, some of whom had had Snow fellowships and the like. The third portion of this group said, oh, they couldn’t do it for that amount of money, and that the Snow Memorial Trust should give them two million dollars. Nobody would give money to a scholarship program that hadn’t received one of the scholarships.

So then the debate began. Should they go back to talk to them and explain this? Should they have the general counsel go with them? And Rollie said—I won’t repeat what he said at the meeting, because everybody went, “Ooh,” when he said it—but he said, “Offer them the \$250,000. That’s what we’ve offered to everybody else, and if they don’t want to be a part of it, let’s let it go.” So the discussion ended at that point, and I think the organization—it was an undergraduate school down there—raised \$4,000, so we gave them \$4,000.

Some years later I had a call from a new development officer there. I think the person who was the president of that particular portion of the university, or the director, had left, and she said, “I just wondered why the grants of money to our organization had ended.”

I said, “You’re the development director. You might as well know the story. Well, this is the story.”

She said, “Oh. That’s not a good way to do development work.”

I said, “Probably not.” [laughter] But that ended it.

But for Rollie, that was the case where he decided there wasn’t going to be any

resolution. It really wasn’t with the board members as such, but saying, “Let’s end the discussion and get on with something else, because this organization is going to have to adhere to the offer or we’re going to have to let it go.” He was very good at that.

The fellow who was the general counsel at that time was another one who was really good at resolving things. He was there for the legal questions, and actually had served on the board at one time before Jonathan. He preceded Jonathan with the idea that when Jonathan was old enough, Jonathan would become the board member. He had served as the general counsel until last year, and decided we really didn’t need him anymore, we were in good shape, and we could always call up and ask.

*Is that a common thing, though, for foundations or organizations to retain counsel?*

The bigger ones certainly will, and many organizations have attorneys who sit on their boards who provide legal services to them or at least suggestions for them. He had been on for a long time. He had been a young partner in one of the firms that I think Allen’s father may have had some connection with at one time. Then he had retired and these people were retained, so Joe became the person who they brought on to do this. He was very bright and very knowledgeable.

When they decided to have an audit of the Memorial Trust, which must have been five or six years ago—a special audit hadn’t been done in a long time—Jonathan and I went through everything and found every grant and made sure that it matched up. The Bank of New York did their work on it, and it was submitted to the Attorney General’s Office, where, just by chance in Syracuse, it was somebody that Joe had gone to law school



with. The fellow said he never saw such a clean audit, so we said, "That's good. We didn't make any mistakes on it." [laughs] Every so often some of the early grant making wasn't as clear as it might have been, so we kept digging till we found everything we needed.

*It's good that you have that archive of information to go back to.*

Yes, and, fortunately, Irving Trust, then Bank of New York, had been the corporate trustees, so they have records as well. So by matching up the two of them, you can usually straighten out any problems or any questions that come up.

*Where do you see the Foundation heading in the future?*

Probably pretty much along the same lines that it does now. The areas that we work in certainly are areas that society needs to support, and this has been tradition. I'm sure if conditions change, they may rethink this, because every year we discuss the mission and where we're going with programs and grants and the like. A few years ago the board members discussed whether they wanted to continue on or whether they wanted to go to payout and the feeling was pretty much they would like the Foundation to continue. People were interested in this and hoped it would continue into future generations. So I think they'll move in that direction unless there are radical changes in the laws that might put charitable foundations out of business, as was threatened in the late 1960s. That is really how the Memorial Trust came into existence.

There had been charitable foundations, of course, for a long, long time, and corporations, and the federal government was beginning

to see some less-than-legal activities within foundations, particularly with family foundations. People were using them to evade taxes in order to retain money themselves. There were discussions in Congress about ending charitable foundations. They didn't talk about ending charitable trusts, but foundations, because charitable trusts had an end life to them.

John Ben Snow, in conjunction, as I'm told, with his attorneys and the like looked at this and said perhaps what ought to be created, when he was going to leave the rest of his money to charitable purposes, was a charitable trust. If necessary, if charitable foundations were going to end, the foundation would make a large grant to the Trust and the Trust would become the administrator of all of this. It never happened. The laws weren't changed in that way, although regulations were certainly imposed upon them and eliminated a lot of the things that people were concerned about. As a result, they ended up with the Foundation and the Trust.

A couple times I know Vernon raised the question of maybe ending the Trust and paying all the money into the Foundation, but that did not seem to garner a lot of interest on the part of the other trustees. So they've just let it go along as it has. It means they were more administrative fees, because you have two organizations, but it works.

*Does it create a lot more administrative fees, dealing with both?*

They're considerable because they're based on the portfolio and the earnings of the portfolio, and what trustees are paid. That's by law. There is a fee set for each of the trustees, and no matter how many you have, whether you have one or fifteen in your organization, under law there is a fee.

DAVID H. SNOW

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*Allison Tracy: Can you tell me a little bit about your early years?*

David Snow: I was born in a small rural northwestern Wisconsin town and grew up there my whole life. I went to college at the state university, Wisconsin State in Stevens Point, and then went on to law school at the University of Wisconsin in Madison, Wisconsin. After law school, I moved to Milwaukee, where I've now lived for twenty-five years, practicing as a corporate attorney for the healthcare industry.

*What got you interested in law and becoming an attorney?*

Mostly I wasn't ready to get a real job when I got out of undergrad. [laughs] I don't know. It's hard to say. The Foundation played a bit of a role. My uncle, Vernon Snow, was on the Foundation at the time and was kind of grooming me to move into the Foundation eventually. He probably planted a few seeds saying "It would be nice to have a lawyer on

the board at some point." That didn't play a real significant role, though. It was mostly just an interest in continuing school for a while. [laughs]

*Was there something specific that led you into corporate law?*

I had an undergrad degree in economics and business and finance, so I had that undergraduate training, which naturally led to corporate kind of law. I'm a CPA, too, so that combination pushes you down the corporate law side of things.

*Can you tell me a little bit about your father?*

He's a Natural Resource Fisheries biologist who worked for the Wisconsin Department of Natural Resources for his whole career, which is why we lived in northern Wisconsin. It was one of the district headquarters for the state DNR, and his research projects were in that area. So after growing up in Milwaukee, he moved to northern Wisconsin for this job

and stayed there for his whole career. He's still there now.

*You had talked about the grooming for the Foundation. Was your father at all involved in the Foundation?*

No, my parents are not involved at all.

*When you were getting these hints about it, was it something that you took seriously or just filed away in the back of your brain? What was your perception of it before you joined?*

I took it seriously, because it came along with a little bit of scholarship money from the Snow Family Trust. The scholarship feature was set up through Jonathan's father, my uncle, Vernon Snow, as part of grooming me to get on the board some day. Vernon would have played more of a role in introducing me to the Foundation. Before I was elected to the board, he had me come as a guest for two years. The first year was 1980 in Williamsburg, Virginia. The second year was 1981, here in Reno. Then the following year, in '82, one of the board members retired and that's when I came onto the board officially as a voting member.

*Can you tell me what the difference between the Foundation and the Trust is?*

They're two different legal entities. The Trust is a trust under New York State law, established by John Ben Snow's will. It's a charitable trust. It has three trustees. Nobody really knows why he wrote that into his will, but when he died in '73, a big portion of his estate poured over into the charitable trust—the John Ben Snow Memorial Trust. That's really when it started.

The Foundation he had started in 1948 and was quite small. It was basically his business

family—mostly executives with Speidel newspapers, which was headquartered here in Reno (eventually, at least). John Ben was one of the owners of Speidel and chairman of the board. The Foundation started in '48 as a charitable foundation in New York, and John Ben kept it real small. Whatever money it was going to give out each year, he would put in right before they gave it out. [laughs] It wasn't really an endowment; it was just a pass-through. He and his few colleagues that he'd anointed to be on the board would gather in his office, the story's told, and smoke a cigar and decide. Basically John Ben would tell them where they were going to give money. Then they'd write some checks, and that would be it. They would have a nice dinner and it was over.

As time went on between '48 and his death in '73, John Ben funded more money into it so that it actually stopped being a pass-through each year and built an endowment over time. It had its own money and they would then invest it and have earnings on those investments to distribute.

Gradually, over that time, from what I can tell and have been told, the foundation started to develop its own identity a bit separate from John Ben. He was always the president the whole time until he passed away. I think some more assets came in when he passed away, out of his estate, to the Foundation in addition to the Trust. Since '74, we've had the two organizations operating side by side.

Really not long after his death, I think, the Foundation started to focus primarily on upstate New York—Syracuse and Pulaski, which is his hometown. That is exclusively our focus now for the Foundation, and all our grants from the Foundation are made in that area.

The Trust became more the national vehicle for grants. "National" is probably the

wrong word. It's multi-regional because it tends to make grants where its trustees are. There are only three trustees. An original trustee was Ralph Snow, who was one of the closest living relatives to John Ben, although still pretty distant. John Ben had no children and no brothers or sisters at the time that he passed away. So Ralph Snow was a trustee, as was Talbot Malcolm, who was John Ben's attorney, and Chick Stout was the original trustee from Reno—a Speidel guy. So it was John Ben, John Ben's family member, John Ben's lawyer, and a Speidel person on the Trust.

The way the Trust is governed is each trustee gets to unilaterally choose their successor. So for the most part, you can trace the trustees down through those lineages. A current trustee is Allen Malcolm, son of John Ben's lawyer. Jonathan Snow is the Snow position. Then Emelie Melton [Williams] is the successor of the Speidel line, because her father, Rollie, was with Speidel, which eventually became part of Gannett. So that's the history of the Trust.

Why he created the two entities instead of putting all his money into the preexisting foundation, nobody really knows for sure. He took that to his grave with him. But one of the theories is—and this would be interesting to the outside world, perhaps, that follow foundations—those provisions of the Trust were being written in the mid to late sixties, and there was a lot of debate going on in Congress at the time about the abuses of a few foundations—corporate and wealthy family foundations being misused for personal gain or to avoid taxes. So there was a lot of congressional chatter about changing the law. They did, in fact change it in 1969; they passed the Private Foundation Reform Act, which created the main tax law that governs private foundations like ours yet today—lots

of investment taxes and self-dealing rules and all kinds of complicated stuff that was intended to limit what were the perceived abuses before the law.

That debate was going on while John Ben's will was being written, and nobody knew how the law would end up, but there was some thought to the idea that if the assets were in a trust, which is an older, longer established common law sort of entity, that it might be better protected from any more onerous laws Congress might put in place, versus having it in the corporate foundation. The Foundation is just a nonprofit corporation under state law in New York. There was some kind of legal regulatory strategy, perhaps, behind that. Of course, as it ended up, the law applies equally to trusts and foundations, so it may have been a good idea at the time as a safety measure, but it ended up not mattering really in the end. The Trust has a charter and it continues until the last of five people die, and then it has to dissolve.

*This may not be specific to the John Ben Snow Foundation, but if there are monies still left in the Trust at the end of it, would that go back to the Foundation?*

It would be up to the trustees at the time to decide what to do with it, and because of federal tax law, it has to remain dedicated to charitable purposes, so they can't take the money for themselves or give it to a corporation or any kind of for-profit entity. As we talk about that day, when it will come, none of us will be around, because Jonathan and I are two of the five people that have to die.

*That's kind of a morbid thought.*

Yes. What they did was they picked the five youngest people in the Snow family tree,

at the time that they put this provision into the Trust and into his will so that it would last as long as it could. At the time, the law was that trusts could not last longer than lives in being at the time. So you could attach the life of a trust to the life of a human or several who were alive at the time the Trust was created, and that's what they did.

I think I'm the oldest on a list of five, so I have to really watch my back. There is my sister, who's a couple years younger, and two second or third cousins, and then Jonathan. So there's five of us. [laughs] It's kind of an odd thing. When that day comes, though, then within a reasonable period of time the Trust will have to dissolve. As we talk about it now as a group, the inclination of the three trustees seems to be to transfer the funds to the Foundation. Of course, Allen won't be around then. Emelie could be around then, but Jonathan won't be, by definition. That seems to be the general thought, though, that it would go to the Foundation. Maybe as that day gets closer, the trustees will decide to do it early, but that requires some court approval and perhaps attorney general approval in the State of New York. There's pretty heavy regulation of charitable trusts and foundations, especially trusts. It could not dissolve early without going to a probate court and getting approval. I think they would need to do attorney general approval, too.

We just kind of work together and cooperate, and we've, over time, evolved into the Trust doing some grants in the Syracuse, upstate New York area, in part because Jonathan, a current trustee, and his dad, Vernon, a former trustee, lived there. It does a lot out here in Reno because this was a strong part of the John Ben Snow roots being connected to Speidel. Then the third trustee, Allen Malcolm, until recently lived in Greater New York City area, and John Ben Snow went

to school there and lived there and worked there for quite a while, so we have a legacy grant in the Greater New York City area, too.

Over time, we've given to others across the country, some just randomly because we get a good pitch from a good charity with a good story and a good purpose and the ability to do something about a problem. Other times, it's because of where some of our people live—Milwaukee, South Carolina, and different places.

*Did you ever actually ever meet John Ben Snow?*

Yes. I remember one time, but my dad recently told me there were two times. When I was a kid, we did a lot of camping in Colorado, and John Ben lived in Colorado Springs a good portion of the year. He had a ranch outside of the Springs. I distinctly remember one meeting, and I may have in my head melded two different ones together, because my dad just recently out of the blue mentioned that I had met him twice. I would have been thirteen or fourteen, probably, and he was in the last years of his life. He would have been in his mid eighties. He passed away at eighty-nine.

It made a distinct impression on me. We went to his big fancy office in a bank building, the office part of a bank building in Colorado Springs. He was very pleased to see some family members. We spent no more than a couple hours, probably, visiting with him and catching up. He was a very distant relative, even to my dad and to Vernon too, but their uncle, Ralph Snow, who was the trustee before Vernon and a board member of the Foundation and president for a while, was very active. He was kind of John Ben's link back into some Snow family relatives that he'd never really associated with before until Ralph.



Ralph kind of found him, and John Ben Snow took a liking to the idea that he had a connection now to some relatives, even though they were very distant. He took a liking to Ralph, and then it all went on from there. Ralph was one of the favorite uncles to my dad and Jonathan's dad, Vernon. Ralph said, "If you're ever in Colorado, stop by and see John Ben." So we did, and that was about it. Otherwise, he never played a role in my life or anything like that.

*He's sort of a myth, it seems.*

Yes. The rich relative, the mythical guy, who was very important, and yet I didn't know why or understand what he had done. At some point I would have learned. The first edition of his biography was published by then, but probably not till after he passed away. So I probably didn't know much about him at all, other than the myth.

*So Ralph Snow was your great-uncle.*

Yes.

*How was Ralph Snow related to John Ben Snow?*

I'd have to pull out the family tree to explain it accurately. This isn't genealogically correct, but the way I've always described it, which seemed to make the most sense to me, was that John Ben Snow was the great-uncle of my great-uncle, Ralph. [laughs] To get from me or Jonathan to John Ben Snow, you have to go straight up six generations and then go diagonally down two to the side to get to John Ben. So he's four generations up, my great-great-great-grandfather's cousin or something like that. I think technically a third or fourth cousin is probably what a genealogist would

call it. So very, very distant. There's a good old-fashioned kind of family tree somewhere that Ralph Snow originally put together, and you can see how John Ben Snow's branch kind of just died out.

*When you first joined the board, can you tell me about some of your early responsibilities?*

Sit and watch and listen, mostly. [laughs] I mean, in '82 I would have been twenty-four.

*Were you still in school at that point?*

I was still in law school, yes. When I came to my first meeting as a guest, I was still an undergraduate, and then I came to the second meeting as a guest here in Reno after I graduated from college. I'm quite proud to have been the only person ever to have hitchhiked to a meeting. As part of my graduation gift to myself, I took off on my thumb from Wisconsin.

I went to Mount Rainier in Seattle and the Olympic Peninsula and all the way down to San Francisco before I came back to Reno to get here in time for the meeting. I walked into my second Snow Foundation meeting at Harrah's Casino with a backpack, after being on the road for about three weeks, carrying a tent and a sleeping bag and camping stove and all that stuff.

*Did you have a long beard at that point?*

No. No, I must have had a razor with me. I didn't have a beard or a mustache at the time. I was a young-blood college student in law school when I came in. When I was officially elected, I think I would have just finished my first year of law school, still wet behind the ears. There was Allen Malcolm, vice president of Irving Trust Company, a big New York



City bank, and Vernon Snow, who was a Ph.D. history professor, and Rollan Melton, who was the former president of Speidel and vice president and on the board of directors of Gannett, one of the biggest publishing companies in the country. Chick Stout was another local Reno person on the board, an executive with Speidel and Gannett. I think maybe he was retired by then.

It was a pretty eye-opening, intimidating group of people to a law school kid. But they were all very receptive and encouraged me to speak up, and listened to me ramble probably ad nauseam, in their minds: "Who's this young buck telling us what he thinks?" But they were very receptive and encouraging. It was an intentional move by Vernon, really, to bring in the next generation very early at such a young age.

*Have you been on the board solid since '82?*

Yes. I am the second-longest serving board member now after Allen. All the rest passed away. Well, actually, no, not all of them. There's a couple who just decided to retire from the board, two or three.

*What other board members were around when you first got there, if you can remember?*

Vernon Snow, Allen Malcolm, Ralph Snow, Chick Stout, Bill Elwood from Cedar Rapids, Iowa, and Bruce Malcolm, Allen's brother, were the seven. I replaced Chick Stout, I believe.

*The Foundation members are elected versus the Trust?*

Yes, democratic organization. There were seven directors in what we from a legal standpoint would call a self-perpetuating

governance structure. You elect your own successors by democratic vote, just like a club. I don't know what's a good example. A Rotary Club, probably. Everybody's a member and has a vote. They elect their board or officers by vote. If somebody tells us they want to stop being a member, then that person probably, as long as they don't resign, still has a vote, and seven people to elect a successor.

*For the Foundation board, do they have the same sort of familial requirements to be on the board?*

There aren't any. There really are no requirements for either the Memorial Trust or the Foundation. There's nothing in the written governing documents that says you have to be a Snow.

*Also with the trustees, there have been the three families that have been heavily involved.*

Not the Memorial Trust, I'm pretty sure. There's a separate family trust that's not charitable, and that one requires a Snow related by blood to John Ben by a defined ancestor, but not for the Memorial Trust. So Jonathan could appoint you, if he wanted to, as a successor.

On the Foundation side, the five non-Snows could vote Jon and me off. It's just a democratic thing. There's no predestined required makeup of the board.

*For those people who haven't been closely associated with the Snow family or with Speidel/Gannett business, how have other people become involved in the Foundation?*

The first person who really wouldn't have any of those connections is Marion Fish, who we just appointed as a committee member

a year or two ago. She's a Syracuse resident. It was partly due to my pushing, and others have certainly agreed and joined in. Over the last few years we've been thinking, since all of what the Foundation does is in the Syracuse area, why don't we have more people involved from there? Marion is our first move to bring in, if you will, a generic person who's not connected to any of the families.

Bill Elwood, who I mentioned was on when I came on, was a corporate attorney for Speidel in Cedar Rapids, so he was part of the Speidel family. Chick Stout was Speidel. Rollie Melton was Speidel. Once Speidel was no more because it got swallowed up by Gannett, we kind of lost the connection. Earlier on in the history of the Foundation, some of the members of the Foundation were, like Rollie Melton, executives from different newspapers that Speidel had around the country.

There was always a connection to Speidel for those folks or to John Ben's lawyer, Talbot Malcolm, and that's why we have Allen. We had Bruce for a while. Bruce retired a couple years ago. We've replaced him with Angus Burton. Angus' wife, Dana, is a cousin to Valerie MacFie, who's on our board as Allen's daughter, so he is a cousin-in-law to Val MacFie. There's always been a Malcolm connection there that you can trace back to Talbot, John Ben's personal lawyer for years.

Then the Speidel position has kind of morphed into the Melton family now, with Emelie and Marilyn. Speidel's just gone, so the Speidel connection isn't there anymore, and it's been replaced by the Meltons, who were a big part of Speidel and Gannett for a long time.

*Was Emelie the first woman to serve on the board at all?*

She came on before Val. Yes, she would have been. There weren't any women before

Emelie who were on the voting board. We had a number of different advisors, investment advisors and the bank trust officers, who have all become part of the family. They attend the annual meetings and they're very involved in the day-to-day management of the investments, the administration of the funds, and the distribution of grants. Ann Scanlon was probably involved before Emelie, but not as a voting member. She was morphed eventually into a program officer. She's a very vital part, and has been for a long time, of the Foundation's charitable and the Trust's grant making in the Syracuse area. She does site visits and interviews potential recipients and plays a big role in deciding who gets the money. Emelie would have been the first voting woman, and then Val MacFie a few years later, and then more recently, Marilyn Melton.

*Can you talk to me a little bit about the officers and their additional responsibilities?*

We're down pretty much to the three officers. Right now I'm the president, through tomorrow, and then we're going to rotate because we have a seven-year-itch rule. [laughs]

*You've been the president for seven years at this point?*

Yes. We put in a bylaw provision, which we could always change by democratic vote, but we never have. We put it in the early nineties that no one should serve in any of the officer positions for more than seven years in a row. You have to take a year off from that position before you come back to it. So this year we'll rotate.

Jonathan does a ton of the work because he's in Syracuse, and Ann is working with

him, too, closely on the grant-making side. That really revolves around them. We have a Grants Committee that helps them sort through the different grants, but it's really Jon and Ann who do most of the lion's share of that work. Marion Fish, who we've had as a local committee member to help with the grant-making side of thing, has a lot of connections, knows the turf, knows a lot of people who can help, and has been in similar positions before with charitable organizations in the community. Just in a few short years, she's been playing an increasingly more important role in the grant-making side of things.

On the numbers side of things, I've been doing the books myself for fifteen years at least, keeping track of the investments and the checkbook on some software.

I was treasurer for seven years and then Jon became treasurer for a year, and I was assistant treasurer. Then I went back to being treasurer for another three or four years before I became president, and Jonathan's now the treasurer. Besides the grant making, he does a lot with helping our investment man to manage our managers of the investment portfolio and track them a little bit. He also pulls us all together a couple times a year—the Investment Committee, which is three or four of us—to think about whether we should move some money around between managers or not—rebalance the portfolio, as we call it.

The other officer position is secretary, which is currently Emelie. That's not so much work. It's just doing the minutes during the meeting and getting out the official notices for the meeting and keeping track of some of the corporate record book paperwork. I did that for a number of years before I became treasurer. Jonathan was probably the secretary for a while, too.

*Do you remember, when you first got on the board, who the officers were at that point?*

Yes. I think Ralph was still the president for a year or two after I came on in '82, but very quickly he stepped out of that role to put Vernon into that role, but stayed on the board. We may have called him a vice president or something, and he was still the trustee of the Trust. For the Foundation, Vernon became the president pretty quickly after I came on. Allen was a vice president. Allen lived in New Jersey at the time. The two of them, from the early eighties into the mid nineties, did all of what Jon and I are doing now. We didn't have the seven-year rule until early in the mid nineties, but they swapped a time or two in there. Allen was president for a while. I succeeded Rollie Melton, I believe.

One of the things I did early on as president was to create a Board of Directors Handbook. It has our bylaws, articles of incorporation, our grant-making policy, and some expense reimbursement. We don't have a lot, but it contains some of that basic paperwork that we govern ourselves with. It includes a history of all of the officers, all the members by year, and the officers by year, too. It's one of the tabs that I put in there, just to have that handy for all of us to see our history—the elite group, the chosen few.

*Can you tell me, when you're managing a large sum of money, how actively do you have to stay on top of that as an investment and watch what's happening with it, and how closely do you work with the banks that are helping you manage it?*

Not really that closely. I think the term they use is "actively managed." Our total endowment is split actually now between four investment managers, and two of them

are really just mutual funds. One is the TIFF. It's a special family of mutual funds just for foundations and public charity endowments like colleges and universities. It's made for organizations like us. We've got some of our money in there, and those are just mutual funds, so we don't have any say in what each mutual fund does. We can switch. They've got a handful of different kinds of mutual funds—international and domestic. We switch our money around a little bit between some of those mutual funds they have.

Then we have the Tocqueville as an investment manager. That is the traditional stock. It's all invested in stocks and managed by an individual with that company, and he's got the individual authority to buy and sell without calling us. We've got an investment policy that sets some parameters. That's one of the things in our handbook. We don't want more than a certain percentage of our total endowment in any one stock and more than a certain percentage with any one manager—risk/reward general targets. But the individual managers buy and sell, so they're not calling us up saying, "Hey, I want to buy some IBM. Do you think it's a good idea? Is it okay?" What do we know? That's what we hire them to do, which is different than the Trust. The Trust is a different legal animal. The trustees have much more personal legal liability for the results of the Trust, and under New York State law, the trustees can't give up that kind of authority in the same way that we can with the Foundation. Their investment manager will get at least two of the three trustees to say, "Yes, okay, sell."

It's the difference between the two organizations. That's really driven by New York State law for trustees and the terms of the Trust itself. It's a more archaic form of governing a charity than the corporate form, so there's less ability to delegate authority.

*Which has more authority over trusts and foundations, the state or the federal government?*

It's a mix of both. The thing that really drives foundations like ours is the federal tax law, and it's the 1969 Private Foundation Act that says if you're not a public charity, like United Way or UNR's Government College, your 501(C)(3) charitable organization. Our exempt status under federal tax law and the rules that we have to comply with to keep that status really set the biggest parameters around what we do. Public charities are not subject to these private foundation rules under the law, but privately controlled charities, private foundations, are subject to these stricter rules. So we have to by federal tax law distribute at least 5 percent of our fair market value each year to qualified charities, and that's part of that 1969 tax law. It's been in place ever since then. If you don't, there are big penalties that apply, and you just pay it over to the IRS and the federal government. They're called penalties, but they're really prohibitions. They're so huge, you have to comply with that rule.

That's a big part of our investment policy that someone like a university foundation doesn't have to worry about because they don't have this 5 percent rule, because they're a public charity. We have to make sure we know every year we've got to give out 5 percent. We were worth nine million bucks on 12/31/07, so we had to give out about \$450,000 a year to charities.

On December 31, '08, we were 5.9 million, so we only have to give out—that's kind of the way this law works—5 percent of that six million bucks. So at the end of '08, we have to give out during '09. We had such a big drop in our value because of the markets, we can't shut off our grants, which we wouldn't want to do anyway, but we can't shut off our grants to

preserve our endowment and build it back up a little quicker. We have to pay out 5 percent every year. That's just the way the law works. The Trust is subject to that same federal tax law.

As a corporation, the Foundation... corporate law is a lot more flexible. You can do whatever you want as long as it's devoted to nonprofit purposes. We can do quite a bit and have a lot of flexibility under New York State law, so it's the federal tax law that's much more our concern. On the Trust side, the Trust has to live with the same federal tax law, but there's much more oversight by the state attorney general in New York in particular. Not all states are as restrictive as New York is for trusts. For New York, there are a lot of big trusts there. They're pretty on top of it, and the attorney general has authority to oversee that.

There's no set time period, but every so often the Trust has to go through an accounting. They have to go before a judge in the local circuit court, or probate court, and account for all of their expenditures back to the last time it was accounted for and show that everything was being done consistent with the Trust document itself and state law governing trusts. We don't have to do anything like that for the Foundation, so it just makes trusts more restrictive.

One of the things that's written into the Trust that the Trust has always had to juggle—and I don't think this is state law; it was just written into the charter or the Trust—is that it has to distribute its income each year for either charitable grants or associated expenses, like the trustee commissions that are paid. So the Trust has two distribution requirements it has to juggle—one is the 5 percent federal tax law, and the other is this really archaic concept of trust income versus principal. The Trust income is things like interest and dividends

and recognized capital gains. If you sell a stock for more than you paid for it, you have a gain. That's part of your income. The Trust has to make sure they meet that income distribution requirement and the 5 percent of fair market value requirement. There have been years in the past when that's been a tightrope for them to walk to make sure they don't run afoul of either of those rules.

*Ultimately, who's responsible for ensuring that that happens?*

For the Foundation it's the responsibility of the board to make sure we comply with all the laws and other regulatory requirements we might have. We have to get an audit. New York State law does require charities over a certain size to have an audit. We have an outside audit by an accounting firm, and we have to file a copy of that report with the New York Attorney General's Office. We have tax returns and reports we have to file every year, and the federal tax return goes through all of these distribution requirements, investment income, and excise tax. Our names get listed and how much we pay in trustee fees or board fees and all that kind of stuff. That's all listed out there, along with all our expenses, and those are publicly available documents.

*For the trust is this where a lawyer might come in handy in negotiating those two requirements?*

The Trust officer actually plays an important role in that. The Trust did have an attorney on retainer, a New York estate planning attorney, for a long time who just retired a couple years ago from attending our meetings. He played an important role in helping with that, too. Between him and the trust company, Bank of New York Trust Department, they keep track under the Trust.



They're the corporate trustee, so they have custody of the assets. We couldn't change that without getting court approval, because it's written into the will. It was originally Irving Trust Company, but that got swallowed up eventually by Bank of New York, and so that's the current trustee. Their Trust Department manages the investments and decides which stocks to invest in, in conjunction with the trustees. They have to get their authority. Then they have trust accounting and trust officer folks who kind of oversee the income and write the checks to the recipients that the trustees pick for the grants and help manage those distribution requirements, file tax returns, all that stuff. That's all done by the corporate trustee on the Trust side.

*For the Foundation, how long as it been that you've split up the funds between the four investment managers?*

We did that in 1998. Before that, it was Irving Trust Company, the same as the Trust. Trust company investment managers tend to be more conservative. Not that we were really unhappy with them; we just thought from a risk-management standpoint it's better to spread the money around. We entertained probably seven or eight different proposals, interviewed four, and selected three. Five years later, we reevaluated and took money away from one and brought in a new one, just based on performance. That's the whole idea—to diversify the portfolio not only between different kinds of stocks and different bonds, but also diversify it between managers. You get different philosophies, different skill sets, and create a little bit of competition. We're not really intense about it, but that is part of the purpose.

As part of our rebalancing that we try and do at least once a year, we'll look at what

each has done. One of the odd things about that is you've got these investment guidelines that state you don't want one manager to have more than X percentage. Well, if one of them is really successful vis-à-vis the others, then their percentage of our total portfolio gets above our guideline and we end up taking money away from our most successful performer and giving it to someone else. That's kind of hard to do, but the test of time has shown that sticking with that kind of a diversification philosophy is the best way over time to manage your risk and maximize return at the same time.

*Can you talk to me a little bit about the philosophy and the mission of the Foundation and the Trust and the types of areas that they fund?*

We've done a few retreats. Once every seven or eight years we'll devote an extra day to trying to talk about some of that stuff besides what just happens organically in the meetings. Most of it's inherited. It's not like some foundations or trusts that are out there that say, "Cure lung cancer, and all the money's for that." We don't have anything like that written into our charter.

Our only restriction in either entity is the bare minimum that's required by the federal tax code that you give to other 501(C)(3) charitable or education organizations, and that's it. There are no restrictions that were imposed by John Ben Snow, the founder, that say we can only give to certain kinds of things or have to give a certain percentage to anybody or any kind of mission or purpose. That's good in some ways. In other ways it's harder because it's like the world's wide open. You can do whatever you want, and trying to figure out what to do with it is pretty hard, because there's so many competing needs and



important things to fund. There's not enough money to fund everything that should be funded, so it's a hard task.

It's kind of organic, and it's just evolved over time. John Ben was a small-town, upstate New York kid who got on the train and rode to New York City. Twenty years later, he's a millionaire. So he was a self-made man, and very proud of that fact, I think. He always had, I think, a philosophy of trying to help people who want to help themselves, so scholarships were big for him. Those are good programs. You mix in a bit of financial need with academic ability, and that's a really good investment of the charitable dollar. You're investing in young people who are trying to go for a college degree or an advanced degree or something like that. That does a lot of good for a lot of other people, too, when those people are successful in their endeavors.

When I came on in the mid eighties, by the late eighties we sat down at one meeting and collectively we went through our grant list. There was only 20 percent of our total grant budget, probably more like 10 percent that was available for new applicants. It was all continuing and carryover grants, and most of those were scholarship programs. They were hard to say no to. They're very worthy, and do a lot of good, and we get a lot of nice letters from people saying, "Thanks so much. I just graduated and I couldn't have done it without the John Ben Snow Foundation Scholarship." It's good stuff.

We had a ton of different programs in New York City at New York Law School and New York Business School. We had one at a private primary and high school education school in upstate New York that John Ben had actually gone to for a while, and it was to fund scholarships for Native Americans from the area to go to that school. We had a whole bunch of great, great scholarship programs,

but the problem was, you can't say no. [laughs] We got addicted to them, and they to us and to the money. So an overwhelming percentage of our budget was tied up with continuing and carryover grants, which is what we call them. We weren't making multi-year commitments, technically, but it was just the kind of thing that went on and on and on, and they were too good to say no to. It had become a problem because we were getting all these applications of worthy recipients, and we could only take one or two a year.

So we talked a lot about changing that and how do you go about changing that. We didn't want to just cut off all these scholarship programs cold turkey. It was both the Foundation and the Trust, and we ended up with a very, I think, successful strategy that took more than five years. Actually, we're still doing a little bit of it to this day, not with some of the grants we had back then, but with others that became carryover phenomena.

We would talk to the recipient. We did a little bit of proactive grant making. We would say, "Look, we can't keep doing this forever, so what we want to do is work with you to create an endowment at your school. We'll keep funding what we've been doing and then we'll add some seed money for an endowment. You go find some matching money to build an endowment." Over a four- or five-year period the endowment would get big enough to take care of the scholarships we'd been funding out of our grant budget, and then we could cut them off because they would have the money in house.

There's at least a half a dozen, if not ten or twelve of those, that we did over time. A couple of them, at our insistence, had been around long enough that they could go to their former Snow Scholars from ten years ago or more and solicit them for contributions to the endowment fund to build a Snow

Scholarship Fund at that university. So, from the late eighties into the mid nineties, we spent a lot of time doing that. There were a couple years on the Trust side when they didn't give any new money, and all the money went to divesting ourselves of those carryover programs. Then we started from scratch again.

We made a concerted effort ever since to stay away from those. We still have a few legacy things in John Ben's hometown and some other places. One of the things we did this for besides scholarships was that John Ben had always given a gift to the church in Pulaski, New York, that he grew up in. He had always done it through the Foundation, and so we had inherited that after he passed away, and we continued to do it. It wasn't much; it was five grand or something. Finally we said, "Let's just create an endowment that can fund that five grand. We'll spend a little extra for a few years, and then we'll just cut it off, because they'll have enough money to earn five grand a year on to take care of that themselves." We actually did that with a number of similar kind of legacy grantees that weren't the scholarship programs either.

Another thing that we did, which was my original idea along with Vernon's, was to create a Pulaski Fund in the Greater Syracuse Community Foundation. There's a community foundation there that is a collection of separate funds for dedicated purposes. Along with John Ben's idea of helping people help themselves, we'd spent so much money in Pulaski, there wasn't a lot of other stuff to spend it on for charitable purposes. We wanted to get members of the community involved in charitable grant making and deciding how to get money, raise money for charitable purposes, and then use it in their own community. So we created a matching program with the Greater Syracuse Community Foundation, where for every

dollar up to something like twenty-five grand that the local community raised for this fund, we would match it over a multiple period of years to build up a large fund within the Syracuse Fund.

Part of the terms of that fund is that local community members from Pulaski decide how to spend its investment earnings on charitable activities in Pulaski. That's now, I think, a couple hundred thousand dollar endowment. It's not huge, but they've got fifteen or twenty grand a year that they can spend on lots of little but very targeted lots-of-bang-for-your-charitable-buck things. They're on the streets there in the community; they know what will make a difference, and they're very prudent about how they spend the money, because it's their money.

*Can you tell me a few of the universities where you've created these endowed scholarships?*

Syracuse University. New York University Business and Law—two or three of them in New York City. Jonathan would have a better memory. Some the private schools around upstate New York, too. Mount Hermon schools, the primary education where we, I think, did something like that.

*How big of a community is Pulaski?*

Five or six thousand. If you drive into town, that's what it will say. Maybe even less, more like two or three. I think the larger community around it probably is closer to nine or ten thousand. It's fifty miles north of Syracuse. It's six or seven miles off the very eastern tip of Lake Ontario. It's a little snow belt right there because all the winds coming in dump a lot of lake-effect snow. It has not been very economically thriving for a long time. They've had hard times there. That's

the community where he grew up. There's a Snow Memorial Library there. The house that he grew up in is the Pulaski Historical Foundation, and there's snow everywhere. [laughs]

*Both in terms of the family and the weather phenomenon.*

Yes.

*You have offices, or an office at least, in Pulaski.*

Yes, it's more for show than for actual use, but it's in the Snow Memorial Library and Town Hall that was built sometime in the seventies, maybe even the funding was while John Ben was still alive. It's got the library, it's got the boardroom for the City Council meetings and the mayor's office, and the city police have their offices there. Some of the other city municipal offices, city clerk or town clerk is there also. Then there's a historical room—the John Ben Snow Room. There's a display of some of his old effects, and then there's a John Ben Snow History Room. It's just a small office. Vernon used it a lot. Jonathan doesn't use it that much anymore, I don't think. We store a lot of artifacts there. There's actually a pretty nice storage room that's connected to that office, so we keep a lot of our old records and things there, but it's not used that much.

*Then Jonathan and Ann work out of Syracuse, right?*

Yes. That's our main office. We rent four rooms, basically, in a small office building, where they spend most of their time. Both are part-time. Ann's 80 percent, and maybe a little less, and Jon is more like 20 percent, maybe a little more. He's there most days for

a couple hours, but it's not an eight- or nine-hour-a-day kind of job.

*For the Trust, they now donate to different regions of the country, but was there a time when they still focused on central New York?*

No, I think it goes back to John Ben originally. Somewhere we've got a list of all our grants. Initially it was probably more New York City than Syracuse and Pulaski, although he did stuff in Pulaski, too. It would have started and developed from Speidel. New York City got grants because John Ben had worked and lived there and was educated there, and then we had some grants around Colorado Springs because he lived there, too. He had a ranch there and lived there half the time. A lot of grants are made around Reno because of Chick Stout and Rollie Melton. There are some older predecessors that were from this area too. Bill Elwood was from Cedar Rapids, Iowa, where Speidel had a newspaper, and so there had been some grants there.

It really started with that, and it's just morphed over time to have these foci around where the trustees live. It's easier to make grants where you live than it is across the country somewhere. So I think it goes back to the beginning. There was never a concerted effort to regionalize, "We need to start making grants in X." It all just evolved over time.

The only thing we would have done consciously from a geographic standpoint, and I can't tell you when, was to decide to make the Foundation kind of the local upstate New York resource and not do stuff through the Foundation elsewhere. Vernon probably played a big role in that, and it just made sense to divide it up that way.

*What kind of organizations and charities do the Foundation or Trust fund or focus on?*

Philosophically, we generally stay away from governmental entities like UNR, although we do some. Generally, we stay away from publicly supported, government supported organizations. We tend to try to stay away from religious organizations, with John Ben's Pulaski Baptist Church being the lone exception. After that, for a long time we had that big educational focus with a big hunk of our budget going to scholarships, which meant we were giving money to universities mostly. Since we've weaned ourselves off of the scholarship addiction, it's been a wide array of all kind of different things. I don't know what you'd call them—general community service organizations, such as YMCAs for specific programs that are usually designed to reach out to the low-income and handicapped. We've had a bit of a disability focus for some things. We've done some funding, too, for different camps and outdoor organizations to make it easier for the handicapped to have access.

We've done a lot for libraries that need seed money for handicap access, hearing impaired assistance, or different things like that—different things to help libraries in small communities get a little bit more upgraded to modern times. Other than generally staying away from public institutions and churches, we're wide open to just about anything else. We don't give to United Way and general-purpose things like that. We're for targeted purposes.

We've had a journalism bent because of the Speidel connection, both at the Trust's regional level and locally in Syracuse. One of our legacy grants that we still haven't weaned ourselves off and probably won't is for some journalism school programs at Syracuse University. Rollie Melton actually helped us evaluate and start some of those. John Ben made a big hunk of his fortune on journalism

through newspapers, so we've continued some of that. Otherwise, there really isn't any other specific limit or one single kind of entity that I would say we give to. We try and spread it around.

*Is there one specific organization or initiative that stands out for you that you have funded?*

Boy, that's hard to say. There's so many of them. I like that Pulaski Fund thing. It's always been a favorite because it's a mix of our money and the local people's money, and they control it. We get a report every year on how much they raised, what they've used it for, and what successes they've had with different projects in Pulaski. That's always neat because we leveraged our charitable money and got some other people involved in doing some charitable things. Both financially and purpose-wise, we leveraged that, so that was good.

So many of those scholarship programs that we did for so long, we're a little more removed from, but those were always rewarding to see. We just helped so many students. We still make scholarships grants to Pulaski High School graduates every year, and that's a really special one because it's in part based on need. There are a lot of kids who maybe couldn't go to college or would have a really tough time going to college if they didn't get the Snow scholarships. That's one of the programs where we actually have Snow Scholars donating back to help fund new scholarships. That kind of stuff's neat to see.

*Can you talk to me a little bit about the decision-making process that you go through for grants when you receive a grant proposal?*

It's a lot different now than it was when I came on. It's more delegated to Ann and Jon

as the program officers, if you will, who are on the street there for the Foundation. They have a more scientific, if you will, or formalized process. We've got some deadlines—you have to have an initial inquiry in by a certain date, and then if we say we're interested in seeing more, then you have to submit a full application with certain required pieces of information by another date. Then Jon and Ann do their own thing in looking at them and seeing which ones they like. Sometimes they'll go out and do a site visit or have somebody come in for a quick interview.

We then have a Grants Committee meeting in early May. I haven't been on it now for a couple years, but I was on the Grants Committee for a long time. I would go to Syracuse for a two- or three-day session where we'd do a bunch of site visits either to prospective grantees or ones we'd given to before as a follow-up.

Then we'd sit down with a list of close to a hundred now that we give more complete information on. Then we wean it down. This year the Foundation's making about twenty or twenty-one grants out of, I think, eighty applications. Most of that work is done by the Grants Committee and Jon and Ann. Then we have our meeting tomorrow, where we've got a summary report of the twenty-one recommended grants for \$300,000 this year that the Grants Committee is recommending.

Most of the time now the board approves that en masse. We ask some questions. Something might catch somebody's fancy, so we ask a few more questions and learn a little bit more about it. Once in a great while somebody might say, "You know, I don't know that I like this one. Tell me more about it." We might decide to switch to a different grant or change the money and lower it a little bit or give more to one because somebody

really likes it. But mostly we follow the Grant Committee recommendation en masse and approve that as a board.

Back when I got on, it was much more work. We didn't have Ann. We didn't have a program officer. It was Ralph and Vernon. It was not much of a formalized process like we have now with deadlines and stuff. Our meetings were twice as long as they are now, and we'd spend a lot of that time going over seven people asking questions about every little thing on every grant. [laughs] It took a long time. We did the same thing for investments, too. But now through the committee structure, we have delegated that to a smaller subset and formalized the process a bit more as we've evolved over time.

*What other committees exist besides Grants and Investment?*

Grants, Investment, Compensation, and, I guess Finance, but Finance and Investment are not the same thing. Investments covers just the investments. Finance includes doing the annual budget and making sure we have enough cash in the bank to write the checks and stuff like that.

*Can you talk to me a little bit about the yearly meetings, maybe some of the different ones you remember having over the years and what function they play for the Foundation and the Trust?*

I wrote in this year's President's Report about how much time we spend reviewing grants and investments, how many things have changed, how the faces have changed but it still feels like a family reunion. It's a different animal because we're so geographically spread out. We can't get together monthly or even quarterly. It's just too cost-prohibitive and



time-prohibitive for people. So we've always had just one annual meeting.

A lot of charities and private foundations that are much more local with family members or corporate people all in the same community, they can meet every month or every quarter and do a lot more, but we can't. It just doesn't work. We've been doing more by teleconference and e-mail. We still have a few members that are not in the e-mail world, but we're getting close to 100 percent. We just got an Internet connection at the office about two years ago. Before that, we didn't have Internet at the office. Jonathan just did it at home.

Things like that have changed over time. We're doing so much more now by e-mail and Internet, that we can connect more. Maybe we could get to the point where we could have quarterly meetings. I live on the telephone in my profession. So does Jonathan. I'm used to all-day meetings sometimes on the phone, or at least where some of the people are on the phone. Our older members, which really includes just Allen now, aren't used to that world, don't live and work in that world, and have a tougher time. As we turn over a bit, get younger or at least newer, and more technology-proficient generations come in, we'll probably be able to move to doing quarterly meetings by phone or maybe video conference. Who knows? It won't be that hard. We can exchange a lot of stuff by e-mail with just a push of the button that for so long took days to mail. Even though we had Internet for a lot of that time, people just weren't capable or used to using it.

We'll still, I think, always need to have an in-person meeting, because you've got to know who you're dealing with, face to face, person to person, and spend time with them. That social part and the face-to-face time in the meetings will always be important. We'll have to do that once a year, I think.

These last few years we've gone to not bringing all the investment managers to the meeting. Back when it was one investment manager, they were there the whole time. Then when we had three or four of them, it was a little awkward, because we didn't want them sitting in the whole meeting. Back when it was just Irving Trust, they'd sit through the whole thing. Tomorrow, however, for the first time in my memory, and in fact I know it's the first time ever, we don't have any of our investment managers here in person. We've got a schedule tomorrow morning from nine till almost noon where the four different ones will call in and we'll listen to them on the telephone, ask questions, and listen to their report. They delivered reports here by mail earlier, so we'll have that to look at while we listen to them talk.

We've always had at least one investment manager, and usually two. It's just kind of based on geography, where our meetings are versus where the managers are and what their schedules are. Some of the folks just aren't as comfortable doing business that way, but we're headed more and more that way.

I think for the Grants Committee meeting this year in May, Jonathan, Ann, and Marion were there because they're all in Syracuse, but Emelie and Val did it by phone. Things like that are changing and evolving over time, but we'll always need to have a meeting, I think, once a year just for that face-to-face time.

*What are some of the places where you've had these yearly meetings?*

We've been some great places: New York City; Boston; Syracuse; Cooperstown, which is near Syracuse; Milwaukee; Santa Fe; Reno; San Francisco; Charlestown, South Carolina, and Colorado Springs. Some of those more than once, obviously.



*Has there been one location or one meeting that stands out in your mind as particularly enjoyable?*

Now you're getting into the good stuff. [laughs] Yes, multiple ones, but Santa Fe has always been a favorite. It's a neat place. I've been there two or three times now for the Foundation, but we stayed the first time at the La Fonda, which is the end of the trail. It's the oldest hotel or resort in the country, I think. It's six hundred years old or something. It's at the end of the trail up from Mexico. A beautiful place. We were there for two and a half days of meetings, back when we did longer meetings, and we just had a great stretch of weather. We had a deck to ourselves up on the roof, looking out over the Rio Grande Valley, so we watched the sunset every night. That's certainly one of my favorite places.

I've enjoyed all of them. We get to a lot of neat places, and they've always been, for the most part, close to one of our members or close to where we've made grants. But Santa Fe has always stood out. Colorado Springs, too, because John Ben's roots were there and there's the museum in town that has some John Ben Snow-funded displays and things.

*Isn't his mechanical horse still out there?*

Yes. Last time we were in the Springs, we asked and they didn't have anything out right then, but they still had it in storage, I think. I never saw the mechanical horse live, just in pictures.

*Can you talk to me a little bit about how many of the grant proposals that you fund are solicited and how many are unsolicited?*

Jon would have a better handle on it, but we certainly have examples of proactive grant

making where we go to them and say, "Hey, we heard about you." A lot of times it's more organizations we've made grants to before. We know they're a good organization and can get things done. On our own we'll just hear about things that might be a good idea to try. Vernon really started this, and Jonathan's done it, too, in Syracuse—going to a charity and saying, "Will you do this? If you'll do this, we might give you some money to do it." That's probably still a small minority, less than 50, probably. I would guess fewer than 25 percent of the grants that are made are ones we initiated. Ann and Jon might have a different answer. They would know better, but that's my guess.

Part of that is because there's such a high volume of requestors. Everything is available on the Internet. They can find you. We get some wacko requests sometimes that we just reject out of hand. There's a whole industry out there of people who solicit grants to send their kids to college or whatever—things that aren't charitable and that we can't give to and don't, so we just dismiss them out of hand. There are so many needy organizations with good things going on that are pretty sophisticated at finding potential funding sources, and so you just get a lot of grant requests, far more than you could figure out how to come up with on your own to do. So just because of that, that's the majority—where we get asked.

Some of our best ones are the ones that we help steer. The idea of soliciting former scholarship recipients to donate back to an endowment was something that probably Allen or Vernon came up with, or both, with some New York School of Business scholarships that were some of the biggest ones we were doing. It was very successful. John Ben had been doing it since the sixties, and there were actually some names you would recognize in the scholarship recipients. The school took up the charge, and they had

the alumni mailing list, so they went after them. Those people responded with a lot of money to help people follow in their footsteps. The more proactive grant making is along those kinds of lines—tweaking something or going to a known quantity that we can maybe bring a little bit of a new idea to.

*Is it an added benefit to encourage philanthropy in other people who may not have otherwise considered it?*

Yes, I imagine. I mean, in that scenario in particular you remind somebody that, “Hey, you got your college degree,” or whatever it was, “because somebody helped you. Will you, in turn, help somebody else do the same thing?” It breeds more philanthropy or philanthropic thinking, I suppose.

*Is there an average amount that you give in grant money or a range of amounts?*

For the Foundation, I think generally up to twenty-five grand, and probably mostly fifteen or less, with a lot between five and ten. This year we’ve got some that are twenty-five hundred and a couple that are twenty-five thousand. For the Foundation, we have a budget that has been as high as about four hundred thousand and as low as probably a hundred fifty, in my tenure—this is my thirtieth meeting. So that’s not a lot of grants.

On the Trust side, it’s probably more like ten to fifty, with a lot in the twenty to thirty range. The Trust is, by comparison, is worth much more. When we were nine million, the Trust was twenty-eight, something like that.

*Another person who we’re interviewing instructed me to ask this question.*

Of me? [laughs]

*Of you. There was something brought up about gravity boots.*

[laughs] Well, that’s not me; that’s my wife. I can’t disclose anything about the gravity boots. I used to wear gravity boots, though. Do you know what gravity boots are? They’re still around. It’s this thing you clamp around your ankle, and then it’s got a hook that comes up like this. When I had them, I had a bar mounted in a doorway, like a chin-up bar, and you would swing your legs up and put those hooks on the bar, and then you’d hang upside down. It was actually for medical reasons. It’s to reverse the effects of gravity on your spine. I’ve had back problems for years, and that was one of the things that the doctor recommended that I wear. There’s more to the story, but it can’t go on tape.

*With that, I will thank you for your time. I certainly appreciate it and your candor.*



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JONATHAN L. SNOW

*Mary Larson: Could you give me a little bit of background on yourself?*

Jonathan Snow: My name is Jonathan Snow. I'm forty-two years old, and the son of Vernon Snow. I was born and raised in Lincoln, Nebraska, and then moved to Syracuse in 1973. I'm married and have three children. I enjoy working with the Foundation and the Memorial Trust, but am also in the IT consulting business. Outside of work, I enjoy activities with my kids like soccer, and personally enjoy golf and work with my church.

*In terms of family genealogy, could you talk a little bit about how you're related to John Ben Snow?*

To start, John Ben Snow was never married and never had children, so you actually have to go up to John Ben's father, who was Benjamin Snow, Sr. Then you have to go over to John Ben's uncle, who is Charles Snow. John Ben's grandfather, Benjamin

Snow, Sr., had six children, and of those six children, Charles Snow is the only ancestral line that actually produced issue or offspring who are still alive today. John Ben had one brother who never married either.

So to answer your question, I am a first cousin twice removed of John Ben. You have to go over to Charles Snow line and then come down. His grandfather was my great-great-grandfather.

*How does your fellow board member David Snow come into the mix? Is Charles his great-great-grandfather too?*

Yes, and actually I'm going to double-check that. David is the son of Howard Snow, who was my uncle. My grandfather was Howard Melvin Snow, and then our great-grandfather was Fred Snow. Then our great-great-grandfather was Charles Snow.

*Who would have been John Ben Snow's uncle.*

Uncle, exactly.

*What can you tell us about your father, Vernon, and his involvement with the whole John Ben Snow Foundation and Trust?*

My father was a historian. I was born in Lincoln, Nebraska, and he was chair of the History Department in Lincoln. When John Ben passed away in 1973, we moved from Lincoln to Syracuse, but that plan was already kind of in place before John Ben passed away. My father was working with Ralph Snow, who John Ben had kind of anointed to be involved in both the Family Trust as well as the Foundation. My father was seen as Ralph's successor.

We moved back to Syracuse and he worked at Syracuse University in the History Department. His specialty was English parliamentary history. He had split responsibilities in that he was a professor at Syracuse but he also spent a lot of time with the Foundation. He never became chair of the Syracuse History Department because his interests really transformed from history to philanthropy.

*He ultimately did the biography of John Ben Snow.*

Yes, he did. He wrote, actually, two editions of that biography. He loved to research, and that was his passion and his strength.

*How did he first become involved with the Foundation and the Trust?*

I'm a little fuzzy on this. Ralph Snow was my great-uncle. He was my father's uncle. So my grandfather, my father's father, was Mel Snow, and his brother was Ralph. So he was my father's uncle.

John Ben spent the middle third of his life in England. It was actually when he was over

there that he started setting up the Foundation, which began in 1948. Interestingly, he wanted to get family genealogy going. Perhaps it was because he was isolated by himself, where this whole other line had connections, brothers and sisters and cousins. John Ben was very much isolated in England, but also with only one brother. So he had a passion to really document the Snow family genealogy.

It was actually when John Ben passed away that he not only created the Memorial Trust, which is a grant-making institute, but he created a Family Trust. So to construct the family genealogy, he had heard of Ralph Snow, who was then at Moody Bible Institute (I believe in Chicago). Ralph had an interest in genealogy. He was kind of a self-proclaimed genealogist and was documenting some of the Snow family history. John Ben convinced Ralph to move back to Pulaski and start the whole genealogy on the Snow Family Trust, while getting involved in the Foundation.

*Your part of the Snow family had been out in the Midwest for some time, right?*

Yes. Actually, my father wrote a second book that was almost ready to be published right when he passed away. That book is all about Charles Snow. It's called *Child of Toil*, and it was published by SU Press. That chronicles the life of Charles Snow, who, again, is really the prime line for the whole family as it exists today.

It was Charles Snow who was born and raised in Pulaski, but moved out to Ottawa, Illinois, to work in the ironworks out there. A number of these Snow lines stayed in the Midwest. Two of the lines did not; the Blanchard line moved back to Massachusetts, and another line moved out West to the Seattle area. As a whole, the Snow family as it exists today has really a very large population in

Seattle, a large population in Ottawa, and then pockets elsewhere, Massachusetts being the next one.

*I understand that Ralph had a nickname.*

He did. Ralph was called the Big Snowflake. When he moved back to Pulaski... and I don't know what year he moved back there, unfortunately—when John Ben passed away in 1973, I would have been seven or eight years old, and so I can't recall a lot of those details. Ralph lived right in Pulaski, though, which is a very small village. Just through the nature of the philanthropy and the work that was being done there, he was directly involved in some of the politics and he was given the name of the Big Snowflake.

*How big is Pulaski?*

It's a small village. It's several thousand, I would say. The graduating class of the high school is a hundred students each year. So I would say five thousand or so.

*I'm just trying to get a sense, because in talking about the Foundation and its impact on a town, you realize how much larger it would be if the town is that small.*

That's exactly right.

*You said that your family moved back to Pulaski or the Syracuse area in 1973.*

Yes, 1973.

*What kind of impact did that have on you and your family as a kid?*

I have some vague memories. I have a few very distinct memories of Lincoln—going

to University of Nebraska Lincoln football games, which were huge, and kind of where we lived. I don't remember wrestling with the decision to move, because it was going to happen.

*You didn't have a choice.* [laughs]

I didn't have a choice. But I distinctly remember when we moved back, my father made the decision to not move to Pulaski just because he did not want to get involved. He did not want to live in the same small town with all the politics; he wanted to be somewhat removed from that. So as a result, we moved to a suburb of Syracuse, which is about forty minutes from Pulaski. It was actually John Ben's will that stipulates that you have to live within fifty miles of Pulaski as one of the trustees.

*So Ralph was originally in that position, and then your father was after Ralph.*

Yes. My father got involved in the Foundation even while Ralph was involved, kind of as a junior to Ralph, if you will, as the named successor. When John Ben drew up his will—and he always ran the Foundation this way—he had the Snow family line and he had Ralph and my father. Because of John Ben's interest in the newspaper business, specifically Gannett/Speidel, which became Gannett, he had two individuals from that line. Then he had his legal counsel, who was Talbot Malcolm, who then became Allen Malcolm and now Valerie Malcolm [MacFie].

*When did Ralph pass away?*

That is a very good question. Ralph has one daughter, Valerie, who moved to California, and his wife, Mary, passed away.



Actually, before she passed away, they also moved out to California to be near their daughter. At that point he had stepped down from the Foundation and the Trust. He developed macular degeneration. As a result, one of the things the Foundation does some work in, is seeing-eye dogs and so forth. I don't know the date that Ralph passed away. He was born in 1902. I can recall when we moved to Syracuse we would spend Sunday afternoons up at his house. What John Ben did was to convince Ralph to move back to Pulaski, to get involved, and not only do the family genealogy, but to be the on-site person for the Foundation. John Ben actually bought him a house, and the house is still there. I drive past it. I can remember when we moved back in '73, we would spend probably two Sundays out of a month up there after church, going for Sunday evening dinner. That would have been 1973, 1974, or 1975. So sometime after that, probably in the late seventies, Ralph would have moved out to California and passed away in the eighties.

*So your dad, Vernon, became the principal Foundation Trust person at that point.*

Yes, right.

*So you were within fifty miles of Pulaski at that time?*

Yes, when we moved back to Syracuse, we were about forty miles from Pulaski.

*How has that impacted you, since you are now the representative that has to be within fifty miles.*

Right. Well, when John Ben wrote his will, it was a very different world than it is today, just in terms of where you can be and

the work you can do. At first I wrestled with the decision, because I was in the corporate world and I was moving up the corporate ladder. When my father passed away in 1998, we had actually already had a transition plan for me to move back to Syracuse by September of 1998. He ended up passing away in June of 1998. So everything was already in motion at that point.

But in hindsight, I think the fifty-mile radius is a very good idea because it enables you to be on site where you're doing the grant making. Originally, the Foundation, when Ralph was there, did a lot more work in Pulaski in terms of the grants. Since that point, it was actually my father who pulled the office from Pulaski down to Syracuse. Over the years, more and more of our grant making has been more in the central New York area versus just Pulaski, though we still do a lot of work with Pulaski. So to accommodate the fifty-mile radius, I had to kind of step aside from my current career path. Over the last eleven years I've worked at home professionally while also working at the Foundation. It's enabled me to be on site. It's been a good thing.

*We've talked about your dad and Ralph Snow and a little bit about Allen's father, Talbot Malcolm. Did you know some of the other people who were involved in the early days, like Harry Bunker or Chick Stout or any of those folks?*

I heard the names many, many times. In the earlier days when John Ben was alive, the Foundation meetings were always in Colorado Springs. Following his death, they started going to different places, but I can recall, I must have been five, maybe not even five—I was maybe four—John Ben would put everybody up at the Biltmore. I can recall

going there and being in the room while all the adults would go out to dinner.

I can recall meeting many different people. One of the queens of Colorado Springs was Lorita Bunker, who would always make all the arrangements. I don't have distinct memories of what she looked like; I just know the name. Chick Stout was another name. I did meet Chick on a couple of occasions. So to me, they're names. I would love to have more of an appreciation of their background. I did have a chance to meet John Ben on a few occasions. One of the several distinct memories is when we were out there and he had office in the Mining Building, which is right downtown overlooking Pike's Peak. Actually, I was with David and his sister Donna, and going to his office.

John Ben was a short man—I want to say five-foot-four—but he would stand up and he had a handshake like a vice grip. Even as a very young child, he would shake your hand and almost pull you over the desk as an intimidating move. On his desk he had a little plastic horse, and I can recall him giving that to me.

I can recall going out a few years later—it must have been a year or two later—and he was living on a ranch. He had moved to a ranch, and in the garage was a mechanical horse.

*The infamous mechanical horse.*

The infamous mechanical horse that had, I think, three speeds to it. This was when he could no longer ride a real horse. I can remember that in the garage on this kind of split-level ranch home. So I have a few memories of John Ben.

*What did the horse look like? We were trying to figure out if it was similar to the mechanical bulls?*

It's interesting that that's one of the things that I remember. It's a crisp memory. I remember it kind of had a metal-type bottom, and then it was basically a metal casing with a saddle on it. If I recall, it had sheepskin kind of on the side. I don't recall if it had a tail on the back, a fake tail. But there was a throttle on it, where you could adjust from—I forget what the three speeds that a horse goes—trot, gallop, and canter, I think. So I can recall that throttle, and I can recall it being in the garage right underneath the split-level home. It was sitting on the side of the garage.

I don't know where that is. The saddle is in a horseman museum, the Pioneer Museum, I think it's called, in Colorado Springs. That's where the saddle is today.

*What year would that have been when you started on the board?*

I can remember in 1988 I would have just graduated from college, and there was a board meeting in Syracuse. I can recall going to that not as a board member, but just participating in some of the functions and just to meet the people. The plans were definitely for both David and I to be involved, and by that point David was already involved. At that point I wasn't quite seasoned enough, if you will, to be a board member, and so that was my first exposure to the board as an adult and potential board member.

Then my first board meeting was in Cooperstown, New York. I went to the meeting, not as a board member though, because the whole board had to vote on you. 1992 was my first board meeting in which I was voted in, and that was actually Ann Scanlon's first board meeting, too. I can recall going to that meeting, which was four years after the meeting in Syracuse. Even before that I can recall a couple meetings in New

York City. John Ben actually maintained an apartment for some point in time at the Waldorf Astoria. So the board would go back there, even following his death. We would have periodic board meetings in New York City. I can recall some of those meetings, again as a young adult, probably in my early teens.

So 1992 was my first official board meeting. I have distinct memories of that. My father and David had arranged for Joe Mitchell, who was our legal counsel and had been our legal counsel for a number of years, to be on the board. He had agreed to become a board member for a period of years until I was old enough to hold that position. He's obviously more than capable. Probably at that point he was more capable than me of being a board member.

So in the Cooperstown meeting, Joe stepped down as a board member. He continued to come to all of our meetings as our legal counsel, just not as a voting board member. I had to leave the room, and there was a vote, and I was voted in. Then I can distinctly recall at the next break, the meeting room kind of emptied, and I can remember Rollie coming over to me, in his own gentle way, shaking my hand and saying, "Congratulations. You'll make a fine board member." He was just kind of giving me encouragement to listen, but also to speak up when I felt like I needed to say something.

Then over the next few years, my father was definitely a mentor, but I enjoyed working with Rollie for the next six years. At that point in the Foundation history, Rollie and Allen and my father were the three principals, kind of the older generation, of the Foundation and the Trust. David was the next generation. But I enjoyed and learned a lot from working with Rollie.

*Who else was on the board when you joined it?*

It was myself, David, and Vernon—the three Snows, and it was Allen and Bruce, the two Malcolms.

*Was there someone else from Speidel?*

There should have been two Speidel. Oh, at that point it was Royle. It was Emelie's brother, Royle, who was involved prior to me. I forget what year Emelie started, but at that point there was a switch from Royle to Emelie. So those were the seven at that point. Previously there had been Chick Stout, Bill Murray, George Murphy, Chick Stout.

*George was with Irving Trust?*

Yes, George was with the Irving Trust. Chick was with Speidel. Henry McKenzie is another old name. We have a list going back all the way to 1948 of every board member, what the board consisted of, and all the positions held—president, vice president.

*So there was the old guard on the one side and then the new generation coming up.*

Right.

*Had there been any women on the board that you're aware of prior to Emelie coming in?*

No, there hadn't, and I think that may have been a generational thing of the old guard. John Ben Snow never appointed any women. In John Ben's will for the Memorial Trust and also the Family Trust, he actually appointed the primary trustee and the successor trustee. That's when he appointed Ralph and my father from the Snow side,

and then it was up to my father to appoint his trustee. Originally it was David and then that became me.

So up until Emelie, there were no women involved in the board of the Foundation. Now it's completely reversed. We have Emelie, Val, and Marilyn. We have another person who is on our Syracuse Grants Committee and a community advisor—Marion Hancock Fish. There's David, myself, and Allen, now Angus [Burton], so its four to three, if you think of it that way. I wouldn't be surprised if down the road it was four women and three men. Very different for, I'm sure, John Ben, if he were to see it today.

And Ann is a constant presence. She started off pretty much as more of an office assistant, and her role expanded. I don't recall when she actually started with the Foundation. I want to say it was probably 1990, maybe 1991. She was eventually invited to come to a board meeting, and since 1992, her role has expanded to be program officer.

*When you began on the board, do you remember who the officers were and what their duties were?*

Yes, I do remember. My father was president of the board for a number of years. I'd have to go back and do my research, but I want to say it was twenty-five years that he was president. Since that time, we actually amended the bylaws to say that no person can hold an office more than seven years. But in 1992, I'm fairly certain my father would have been president. Allen would have been vice president and treasurer. At that point, I'm fairly certain Royle was secretary. I don't know if we had another vice president position that wasn't treasurer. That would have been Rollie, probably.

*What were the duties for the different positions?*

I would say the bylaws actually create the positions, and they have some loosely defined responsibilities or duties. The duty of the treasurer is, and continues to be, to monitor the investments, to do the annual budget, to do the annual either audit or review, to prepare a treasurer's report, both backward-looking and forward-looking. The duty of the president remains pretty true today to engage the board in discussions about strategic thinking, as well as to chair the annual meeting. The vice president role doesn't necessarily have separate responsibilities.

*But the vice president and the treasurer's position are always held together, are they?*

I don't think they've always been held together. The secretary's responsibility is to maintain minutes of all the meetings, of the annual meetings, and to maintain the minutes books—a kind of institutional history.

For the board meetings, we have three standing committees, so you have committee chairs. We have an Investment Committee, we have a Grants Committee, and then we also have a Compensation Committee. Obviously, the treasurer typically participates or chairs the Investment Committee. The person on site in Syracuse chairs the Grants Committee along with our program officer, Ann, who participates. The Compensation Committee has been chaired by a number of people. So you have the positions, but then you also have the committees.

We have evolved. When John Ben Snow held the board meetings, they were very quick. He did not waste time. He made the decisions, and everybody else went along.

*Sort of like the telegrams he would send out for correspondence?*

Yes.

*Very short and to the point.*

Right. But following John Ben's death, the meetings grew to be several days long, just for the Foundation being two and a half days. Then over the last ten to fifteen years, we've condensed those, and we do a lot of work by committees now. The Investment Committee meets two to three times a year. The Grants Committee meets once a year for three days prior to the meeting. The Compensation Committee just does some work offline.

*What is that committee involved with?*

That committee is responsible for reviewing and recommending any staff and board salaries. So currently we have one staff person—our program officer, Ann. We get information and actual data from the Council on Foundations, Association of Small Foundations, and they look at trends and similar-sized foundations and what they pay in terms of benefits and all that stuff, and they recommend adjustments. Then they also look at board compensation as well as officer compensation, and they recommend adjustments based upon what's going on out there. It's a once-a-year kind of thing they do.

*This whole division of labor with the committees—did that come about right after John Ben Snow's death or has that been a slower evolution?*

I don't know who started that. I know that when I joined the Foundation, I was on the Grants Committee. So it was already in

place, and at that point my father was the chair, because he was living in Syracuse. But I would tell you we've continued to do even more work offline so that we can shorten the annual meeting time and do more work by committees.

*You said you were on the Grants Committee when you started out. Have you served on the other two committees over time, too, or do people tend to stick to particular committees as board members?*

As the treasurer, I'm on the Investment Committee as well. I'm not the chair, but I'm on the Investment Committee. I am the chair of the Grants Committee. If I recall, at some point I was on the Compensation Committee, so I've been on all three.

*So everybody kind of does the rounds.*

Right.

*Could you discuss the difference between the Trust and the Foundation as far as the types of grants given, the membership of the board, and who has voting rights on each?*

John Ben started the Foundation in 1948, and he actually oversaw it for the first twenty-five years until he passed way in 1973. So the Foundation has very strong donor intent or donor legacy by looking at the type of grants that he—I'm not going to say dictated, but he vocalized very strongly where his money should go. [laughs] So some of the initial grants from the Foundation were to Pulaski as well as to his alma mater, New York University.

Interesting little story, and it's in my father's biography of John Ben Snow. When John Ben went to New York University, he



moved down to New York City. He lived with an aunt, and worked at Woolworth. That's how he got started there, as a stock boy. But when my father looked at his expenses for education and cost of living in the city compared to what he made, he could never understand how John Ben reconciled it.

*How he made ends meet?*

Right. Then my father drew a connection. John Ben attended—I'm going to say it was Fifth Avenue Presbyterian Church, or Fifth Avenue Baptist Church. It was one of the two. Through that, on Sunday evenings John Ben was involved in a Bible study with Rockefeller Jr., who also attended that church and was over there on Sunday evenings. My father speculated that it was Rockefeller Sr., being the philanthropist that he was, who saw John Ben as a young, ambitious entrepreneur, and quietly helped subsidize John Ben's education.

So John Ben goes on to succeed through Woolworth, move over to London, start Woolworth, Ltd., as director of purchasing, and sets up the Foundation in 1948. One of the first grants from the Snow Foundation was right back to New York University for a scholarship. So, it was kind of a full circle, if you will.

Carrying the Foundation forward to present times, neither the will nor the charter of the Foundation established under New York State law limits it to certain types of grants or any geographic area. As a board, though, we have limited the scope of the Foundation to central New York. We've defined key grant-making areas, and a lot of that is based upon over fifty years of organizational history. Our primary grant-making area is education, with that being historically 55 to 60 percent of our grants.

We've done work in arts and culture, community initiatives, as well as journalism from the Speidel-Gannett days. We've lately become involved in environmental issues, and in opening access to waterways. We specifically serve the economically or physically disadvantaged, and also youth programs. So those are, coming at it the other way, the types of populations that we serve. That's where the Foundation has evolved to today—focusing on central New York. The Foundation has a board of seven.

The Trust was established in 1973, when John Ben passed away, by his will. Because of all the legal work that had to be done, I believe the first grant from the Trust was actually made in '75. The will established three trustees to oversee the Trust, named by John Ben in the will, and then there are three successor trustees. So the trustees were Talbot Malcolm and "the Big Snowflake" Ralph. I'd have to look at the will again to see who it was from the Speidel Gannett side.

*Was it Harry Bunker?*

It may have been Harry Bunker. There was another trustee that eventually, just through the Speidel connection, came down to Rollie. There's nothing in the will that says that the three trustees of the Memorial Trust need to sit on the Foundation board, but historically it's been that way.

The Memorial Trust really operates in the same programmatic areas as the Foundation. Historically, the Trust has granted 50 to 55 percent of the grants to education. We also do work with journalism. It's identical. The only difference is we operate on a national basis for the Trust. It's geographical, and the reason is the Foundation is about a third the size of the Trust. So the Trust is three times bigger in terms of assets and three



times bigger in terms of grants that it can make. We don't have to necessarily draw those geographic bounds that we do for the Foundation.

*Is Pulaski involved with the Foundation gifts, or does that have a different arm altogether?*

Both the Foundation and the Memorial Trust have made grants to Pulaski, and really it's only in central New York where you have the two organizations coming together. Here in Reno all they know is the Snow Memorial Trust, and I'm sure many call it the Snow Foundation. In Syracuse, we just tell them to apply to the Foundation. Quite honestly, what it boils down to so often is the size of the grant and what they're looking for. The Foundation makes smaller grants in terms of dollar amounts compared to the Trust.

Lastly, John Ben's will also created a family trust, which we've talked a little bit about. That established a set sum of money to go into a Trust with really two purposes. The first purpose was to create a position for a family trustee, whose responsibilities it is to maintain the genealogy of the whole family trust. Presently, that was Ralph, my father, and now it's me. So incidentally, in terms of descendants of Charles Snow, there are over nine hundred today. Now, that's either by blood or marriage. So when somebody marries in, they're part of the family. Of those nine hundred, I think the number is close to nine hundred eighty; there are close to four hundred eighty who are alive and considered eligible to be what we call recipients. So the second thing that the Family Trust provides for is a distribution of income from this Trust to the family members. That was just John Ben's way of giving back to his own family. Again, none of these are his direct descendants.

So on an annual basis, there's a family trustee and then there's a corporate trustee, which is The Bank of New York Mellon, and then there is a non-family trustee of the Family Trust, which is presently Allen.

*The legal side of it.*

Yes.

*So you've got someone doing the legal side, someone doing the money part, and someone in the family trustee.*

Yes. So the three of us meet annually and we look at the income from this Trust, and the income is distributed to the family members. We actually rotate through all the family members by date of birth, and so any given year, twenty to thirty family members receive a check from the Trust. Over the course of somebody's lifetime they'll get a check four times from the Family Trust, all because of John Ben's desire to help his family.

*How do you track? Do you have a software program that you use?*

Yes. It is a program I wrote. I developed an application using Microsoft Access, basically, to track the required genealogical information. The way the Trust is set up, we also track the distributions and we track some other things on family members. So I maintain correspondence with family members, with nearly five hundred of them. If I haven't talked to somebody or heard from somebody in five years, I correspond with them. Oftentimes it's more frequent than that. This year I had to correspond with every single one of them in March.

*Just to keep everything updated?*

Yes. To get current addresses, everything.

*How much time does that take in the course of a week for you, would you say, or over the course of a month, maybe?*

My responsibilities as Foundation board member and trustee, Memorial Trust trustee, and Family Trust trustee kind of all blend together. Typically during the course of a week it ranges from ten to twenty hours a week for those three. There are peaks and there are valleys.

*I'm assuming right before the annual board meeting it's busy.*

It's busy, yes. Then it's closer to twenty hours a week. During other times, it's closer to ten.

*It sounds like the early 1990s was when the Trust expanded its earlier focus from Syracuse and Central New York. It seems like it might have been in the 1990s when that tripartite organization came around. Was that before you got on the board?*

I would have been on the Foundation board at that point in time. Because the Memorial Trust always has their annual meeting the day after the Foundation meeting, I would sit in on the Trust meetings, although as a silent observer. By the mid nineties, the scope had already expanded beyond central New York. I would say by '95 it had already expanded. It would have been in the early nineties or late eighties.

*I understand there was a change in the management of the Foundation and Trust assets at some point. What can you tell me about that?*

Up until 1998, all of the assets of the Foundation were originally held by Irving Trust, which is where Allen Malcolm actually was a trust officer. That's not why they were held there. But John Ben's investment advisor/legal attorney was involved with Irving Trust, and so John Ben personally was involved. That's where his assets were. Irving Trust eventually became Bank of New York, which is now BNY Mellon. So up until 1998, the Foundation assets were all with BNY Mellon, which, incidentally, is where the Memorial Trust assets still are and the Family Trust assets still are.

*So it's just the Foundation funding that's moved.*

The Foundation's portfolio in 1998, at the direction of Allen, which proved to be exceptional leadership—he did quite a bit of research, and at that point I believe he was chair of the Investment Committee. He recommended to the full board that we diversify the assets into three different money managers. Some things had happened with our Bank of New York relationship on the Foundation side in terms of fees that they were looking to charge and turnover investment managers and so forth, that caused us to look outside. At that point we pulled all the money from the Bank of New York and we diversified.

We looked at the portfolio and we sectioned it up, based upon asset classification and the type of investment mix we were looking for, into three different managers—Merrill Lynch, Tocqueville, and TIFF. One of the managers at Merrill Lynch was a past manager from Bank of New York who was very good. We chose Tocqueville because their money manager was an old Irving Trust connection, who is now working at Tocqueville in a different kind of investment

arrangement. TIFF is the investment fund for foundations, so it's mutual funds specifically for not-for-profit foundations, educational endowments, and so forth.

History will tell, but it's proved to be a very good move. In terms of growth, when one manager performs well, the others may not, and so we now have four different managers. We brought in Northwestern Mutual as a money manager, also.

The other two trusts continue to be with The Bank of New York simply because they're trusts versus private corporations. The Foundation is incorporated. There are different legal issues with doing that, so we haven't done it yet.

*You talked about the types of grants that have been given out by the Foundation and to which areas. Has the mix changed over time?*

I would say education has always been the primary thrust. Initially, the large bulk of the educational grants were to New York University, and over the course of the years, that has expanded to be institutions such as Syracuse. From the Foundation standpoint, they include Syracuse, LeMoyne, Hobart and William Smith. We've diversified the recipients of the education dollars versus giving, say, a \$100,000 grant to NYU, which is what originally was being done. So as we've diversified the investments, we've diversified the grants, and the same would be for the Trust side, whether it's to include Washington College in Maryland or UNR in Reno, or Syracuse. It's educational grants, but diversified.

I would say in terms of target population served, if you look at the initial grant making, the book tells stories of how when John Ben was in England, he would receive the Pulaski Democrat, the local newspaper. He

would have it sent to him, and he would read stories during the Great Depression. One story was about how somebody's house burned down, and he would anonymously have his investment manager at the Irving Trust Company send money, with a wire transfer through Western Union, up to the recipient in Pulaski. They would never know where the money came from. If somebody was going to lose their house because of the Great Depression, he would anonymously send money.

So he's always looked to those who were disadvantaged either economically or socially. I would say the Foundation has also developed a specific focus on youth and trying to help youth who may be disadvantaged either socially, physically, or emotionally. We focus on people trying to create programs, whether it's in arts and culture, educational, or community initiatives, that focus on those two populations. I don't know if I have that report with me, but I do have a listing starting from '48 of where all the dollars went, and I would say from the beginning it was probably closer to 70 percent education, and now we're down closer to any given year 50 to 60.

*It sounds like you've added some emphases, too, with the environmental concerns.*

Environmental, yes.

*Are there any other additions that you can think of in the time that you've been on the board, or is it more an expansion of target communities rather than topical expansion?*

This goes back probably ten or fifteen years. We have funded and continue to fund what we call universal access. It's a second area. Basically it amounts to elevators, with all of the ADA [Americans with Disabilities Act]

requirements imposed on an organization that may have a building. If they're going to expand or renovate or build a new one, all of these ADA requirements are imposed upon them. That may be automatic doors. That may be an ADA slope sidewalk. That may be an elevator to the second floor. It may be handrails in a bathroom. Typically, there's not a lot of money out there to do that and it's not a glamorous thing. Not too long ago, probably four or five years ago, we made three grants to do handicapped-accessible restrooms. So, again, not glamorous but needed.

*Yes, because it's something that nonprofits struggle with.*

Right. So I would say universal access is a second category that we do.

*Have the guidelines that the board may use in analyzing and evaluating proposal changed over the years, or are they still fairly generic?*

I will tell you, from my perspective, since 1992 to current—and I think this may come from the board members who are involved—we are looking at grants more and more as investments that need to yield results. This has been a pretty hot topic in the funding community for the last couple of years—performance-based metrics is what it's called. This means asking not-for-profits, how are you going to know when you succeed and how are you going to measure that, and at the end of the grant, asking them to provide those metrics. We are really treating it more as an investment than just “Here's the money. Do what you want.” So I think we're becoming much more focused on that—on tangible results.

From a grant application process, in terms of how we manage the whole grant cycle,

we've always done that yearly. A number of foundations are twice a year or quarterly. Some are even monthly or rolling. We've always been yearly, and just because of the composition of our board, I don't think that will change.

Three years ago, I brought a proposal to the board to allow the Grants Committee to make off-cycle grant requests. If we get a perfect grant request that falls within our funding criteria but it just doesn't fall into our fairly tight cycle, we would be allowed as the Grants Committee to consider that, assuming all of the appropriate paperwork came with it. A portion of the grant's budget is actually set aside for off-cycle grants, and it gives us a little more agility, if you will, to respond to grants.

*Especially when there are time-sensitive issues.*

Yes. We've done those. In the last three years, we've probably done six or eight of those. I will also tell you that historically I've been back in Syracuse since 1998, and I think we're becoming much more formal, if you will, in terms of the process that we go through in our grants cycle. Where my father brought a historian perspective, even though it's a not-for-profit, I come at this from a business background, so I'm bringing more of a business perspective to the Foundation.

*With grant making for the Foundation, that's all taken care of basically by the Grants Committee?*

Yes.

*So are you told, say, by the Investment Committee what you have to spend?*

Yes.

*Then you take a look at what you've got and try to figure out how to go from there?*

My job as treasurer is to develop the grants budget for the Grants Committee. Since I kind of serve two roles, the hard part about that is I typically have to develop that grants budget by April 1<sup>st</sup>, yet we won't know what that actual amount is until sometime after December 31<sup>st</sup> of this year, because of the way that our grants budget is calculated based upon average investment. It's basically your investment average, beginning and ending month for all twelve months, your grant-related expenses, and then you get what your 5 percent payout requirement has to be. So we won't know that until the end of this year, so it's kind of like looking in your crystal ball and predicting what you think. So last year, nobody predicted. We predicted. Actually, we felt we were being pessimistic when we actually developed our grants budget last year based upon a 2 percent decline in our average and portfolio. We ended up with a 30-some percent decline. So as a result, we overspent last year, and so this year we will underspend.

The grants budget is given to the Grants Committee, but that budget isn't really allocated down to a programmatic area. So we don't say education has 50 percent of budget. We simply look at the grant applications that come in. I will tell you historically the Foundation, in terms of grant dollars and what's being asked, will get three times the number of grant dollars that we can fund. So last year we had over a million dollars that people were asking for, and we funded \$380,000 or \$360,000. This year, I think we had \$800,000, and we're going to end up funding just under \$200,000. So it's even worse this year.

*Because you're trying to make up for last year, and the principal has gone downhill too.*

This year is the double whammy. Not only has the portfolio gone down, but we also have an overpayment from last year that we're going to use some of.

*With the Trust, my understanding is on that side, the money's essentially divided into three segments, and each of the trustees decides how to allocate those?*

That protocol started about the same time, I believe, as when the Trust diversified out of central New York. Given that there are three trustees, whether you're talking about a community initiative or a library or whether you're talking about an educational scholarship fund, Emelie has plenty of needs here in Reno that we may have in Syracuse. So at this point we roughly allocate the grants budget one third, one third, one third. As an example, for the last three years, Emelie and Allen have used a significant amount of their grant dollars to help endow a Syracuse fellowship.

*So it's not geographically limited. It's how the decision making plays out with the tripartite.*

Yes, exactly. Exactly.

*How have the types of proposals that the board receives changed over the years? Has there been any movement in the mix of solicited versus unsolicited proposals or the topics?*

I would tell you that if I go back to John Ben Snow, he basically would make the grants where he wanted to make the grants. I think we went through a period, post John



Ben Snow, when we really began to operate more as a Foundation board. I think we had a number of unsolicited inquiries. With Ann and I in Syracuse, we do more and more solicited, because we will hear of a program. We are tightly connected with a community foundation in Syracuse, as well as with two other private foundations in Syracuse, so we work fairly closely with those three other entities. We see projects and will approach organizations and we'll tell them, "This would be a good one," and encourage them to come to us. Or we'll see a need and we'll ask them to help address a need. We're moving from more reactive unsolicited proposals to be more proactive. Now, we'll always have unsolicited proposals.

*What kinds of things does the board do to try to encourage proposals?*

In Syracuse, it's only Ann and I from the Foundation standpoint, and so we will hear of a need, we'll see needs, we'll see other foundations starting to step in, and we'll work with organizations to help shape a grant request.

With the Memorial Trust, it's each trustee in their community seeing that and helping shape a grant request. The constraint is that there are some foundations that will do 80 percent proactive grant making, and that leaves nothing for the unsolicited proposals. So we're probably, I would say, a third solicited, two-thirds unsolicited.

*Have you seen that change over the time that you've been on the board?*

Yes, in the last ten years I've been back in Syracuse, we're doing more and more solicitation.

*I know a number of different foundations nationally are all managing how they're doing this sort of thing.*

More and more foundations are doing what they'll call initiatives. If you have a million-dollar grants budget, they'll take half a million, 50 percent of that grants budget, and they'll put it all into this initiative, whether it's a neighborhood initiative, or an educational initiative. That really takes away from the unsolicited proposals or the open grant rounds, if you will. That's something that we haven't done. I don't know if we will. We tend to work with the smaller organizations, with the exception of larger educational institutions. We tend to work with the smaller, more grassroots organizations, asking for fewer grant dollars. Quite honestly, those are the ones that typically, in terms of bang for the buck, are results-yielding. A \$2,000 grant to a library to bring the catalog online will yield huge results.

*What are the guiding principles now behind the Foundation and the grants it distributes?*

Well, according to our charter, and it's fairly generic, it's to improve quality of life. It doesn't necessarily limit it to central New York, but we have. That's kind of a broad term. I personally view my job on the Grants Committee as wearing two hats. One hat is on the Investment Committee, and my goal there is to increase the portfolio, without taking on inordinate risk, to basically be the engine behind the programs. I keep one eye on the investments, to make sure that they're going in the right direction. We're not after the home runs, but we're after steady growth, and we are getting that without inordinate risk. So you have the engine funding the programs.



For me, at the end of the day it's about making those grant decisions that will directly impact somebody's life. The Foundation typically does not get into year-after-year grants with an organization.

We've broken that rule on specific occasions when we get a grantee who's doing tremendous work. There's an organization in Syracuse that we have funded for four or five years now, called On Point for College. It was started by a woman who was CFO for a fairly large corporation, and her son had two friends who couldn't get into college just because they came from impoverished, at-risk, single-parent families and didn't have any resources. Their mom didn't know how to fill out a grant application. These were inner-city youth who really had no chance. She helped these two kids. As she helped her son, she helped these two kids fill out funding requests for colleges and fill out college grant applications. They got into school.

She started On Point for College, and now she's helped over a thousand kids in inner-city Syracuse who have good grades, who have the aptitude, and also the desire to go to school. More times than not, it's the \$35 for the application fee, or it's when they go to school they need sheets, they need blankets, they need a backpack, and they need two hundred bucks for books. So her organization has helped so many. They have over twelve hundred kids in school now. We make a grant to them. It's direct and you see results. We've got a number of grants like that.

You're not always going to hit a home run with a grant. There will be some that will fail, and it's important to understand why they fail and then to help work with that organization to eventually turn that failure into a success. Even in the business world you're not always going to succeed.

I think it's about making good decisions. One of the hardest things we have to do is figure out who's going to get the grant dollars and who's not, and to really understand the likelihood of success. I wish there was a formula that you could apply to it, but there's not. Experience helps. I've found that site visits are irreplaceable, not just to see the project, but I put more and more emphasis upon the person or the people in the organization. They're going to make the project happen. Once I meet them, I try to understand not just professionally and credentially who they are, but understand their heart as best as I can. Their passion and their drive will affect more and more my decision.

*What do you see for the Foundation in the future?*

As a board, we go back to that discussion about every five years. We have a board retreat. John Ben Snow never put a sunset date on the Foundation. We discussed this two or three years ago at a retreat, and we're still managing the Foundation and the assets into perpetuity, so there's no sunset date or spend-down plan. Personally I think the board comes out of the perspective that there are needs today, there will be needs tomorrow, and there will be needs the day after and next year and so forth. So we see the Foundation going into perpetuity.

The Memorial Trust actually has a time-determining factor, and that's based upon the will. So at some point the Trust will have to decide what to do, and that's a ways away. At that point the Trust can roll into the Foundation or the Trust can roll into another trust. But I would see the Foundation being true to its strong donor intent of primarily focusing on education. I know the board

believes, as I believe, that education is one of the key successes to enabling a person to go one direction in this world or another, and that's becoming a bigger and bigger hurdle to cross.

*Is there anything that we haven't talked about that you wanted to touch on?*

I would just say that as this board is in a transition period, and we've been in this transition period for the last ten years. After my father passed away in '98, I can recall a board meeting—it may have been the year after my father passed away—when Allen looked at Rollie and said, "Now it's the two of us." Then when Rollie passed away—I don't recall what year that was, 2002 or so, 2003—at the next board meeting, I can recall Allen saying, "I feel like I'm the last Mohican." It was at that point that the chemistry of the board was changing.

I share that because I think that we as the next generation, Emelie, David, myself, and Angus—not so much Angus because he's new, but he brings a whole other depth of experience in the investment consulting business—David, myself, and Emelie, who served on the board under the direction of those three, have been well trained and well coached, and we saw the professionalism with which they ran the organization, and it's our desire to continue that. We owe a lot to that generation.

*You can pass that on to the next round.*

The next generation, yes. I've heard Allen say that the baton has been passed, and he feels very confident in those who are going to continue. It's because they prepared us. I'm excited to see where it goes.



## EMILIE M. WILLIAMS

*Allison Tracy: Can you tell me a little bit about where you were born and where you grew up?*

Emelie Williams: I grew up right here in Reno, Nevada, and went to Reno schools: Hunter Lake, Swope, and Manogue—a Catholic high school. Then I went away to Santa Clara University in Santa Clara, California. There I studied English as my major and political science as my minor. I pursued, at first, a journalism career and then it slowly became a PR career.

I have three older brothers. My parents are Marilyn Melton and Rollan Melton. My mother is a fourth-generation Nevadan, making me a fifth-generation Nevadan, and my kids sixth generation.

My father grew up primarily in Idaho. When he reached about the age of fifteen, he moved to Fallon, Nevada, and really was pretty much homeless. His high-school teachers took a real interest in him and got him a job at the *Fallon Eagle Standard* as a newspaper printer. The people there really thought he could be a good writer. When

he graduated high school, they nominated him for a Pappy Smith Scholarship through Harolds Club, so he went to UNR.

In the meantime, my mother had grown up here in Reno, Nevada, and went to Reno schools. Her parents were native Nevadans. My parents met each other at UNR; she was majoring in art and he in journalism. They got married while still in school, and had a child.

When my dad graduated from UNR, they went to Kansas because of the military. From there, he came back to Reno, Nevada, and pursued a journalism career at the *Reno Gazette*. He made his way from being a writer to being a sports editor, to a copy editor, to an editor, and then became an executive with Speidel. The newspaper ownership was through Speidel.

He then became president, and they merged with the Gannett Corporation in 1978. In 1979 he said, “I don’t want to be a corporate person. I would rather go back to my roots in journalism.” He came back to Reno. He had never really left, but had been stationed part-time in Rochester, New York.

When he came back to Reno, he became a columnist.

My mother, throughout her lifetime, has been an artist, and that goes down deep. Even though she was raising four kids, she was always doing art. She tried to come back and finish her art degree at UNR and never did so, but still has staged major shows here in Nevada.

*Do you remember when your dad got involved with the John Ben Snow Memorial Trust and Foundation? What was your sense of it as he was getting involved?*

We understood as children that he had a very important job, and then suddenly he was saying, "Oh, I have to go to these Snow meetings." Slowly I began to understand that the real financial supporter of Speidel was a gentleman named John Ben Snow. John Ben Snow left money initially in a foundation, and that foundation was started in 1949. He wanted to have newspaper representation, and Chick Stout was the first person from Speidel who was the representative. My father was what they called his second, or his successor.

As a child, I just knew that he would go to these meetings. I really didn't understand what he was doing. I didn't know what a foundation was. As I was at Santa Clara University, I asked a lot more questions about what [the foundation] was, and it was a lot more than one trip a year where you decide who got grants. I came to realize that he was helping with the financial goals of the Foundation and then later on the Trust. The Trust came into play in 1974, upon John Ben Snow's death. So, it meant following a grant, talking to people, finding out what their needs were, trying to help them shape a grant proposal, and then bringing it before the others to see if it was matched.

In terms of the Foundation, all that money stays in New York, and so my dad served on grant committees and did that kind of work. Then later on, with the Trust, he worked with Nevada grantees.

*When you understood what the Foundation and the Trust were and your dad's involvement, at that time did you ever expect to become involved?*

No, I never did, because my dad had named my oldest brother to be a trustee. He was his successor trustee and served on the Foundation in various ways. Then some things came up and my brother resigned that position.

It was later, in 1997, when my dad said to me, "You know, I sure would like to continue having a family member involved." At that time, Speidel no longer existed, and if he named someone who was with Gannett, there was no telling where the stewardship of the grantees would go. It might not mean that the Trust portion would come to northern Nevada anymore, so it was very important to him to keep it with a family member.

I said yes. I had never done any of this type of work, but the way they have it set up, I've just learned over the last fifteen years all the ins and outs of it. It has become more and more professional, even in the years that I've been involved. Hopefully, I've had a part in all of that and helped it take shape more in the twenty-first century.

*Can you tell me what the board was like when you first joined?*

Well, I was the first woman, so that tells you a little bit. There had been an idea all along that John Ben Snow would not appreciate having a woman on the board. However, my

dad was saying, "Take a look at her. She's got some great skills." They met with me. There was no real division on whether they would allow that, but it had been tradition. I broke that tradition. Now here we are in 2011, and we are fifty-fifty between the genders. So we've come a long way.

The makeup of the board was really my dad, Allen [Malcolm], and Vernon [Snow], who wore all in their late sixties to seventies over that fifteen years. Now all three of those gentlemen have passed away, so we're more in the forties and fifties. Who knows? Maybe we'll have some people in their twenties, and some diversity in that way.

Allen Malcolm was the one person who actually met John Ben Snow. Vernon also had met him. They had really served with him. My dad had only met him one time. When we lost Vernon and Allen, we lost a little bit of that feeling of what John Ben would want. That is why we wanted to have this oral history. Going forward, we want to have a feeling of what the founder liked, what his areas of interest were, and a chronicle of how things have progressed.

*Do you remember what your father told you about this legacy, about what John Ben Snow had intended the Trust and the Foundation to fund?*

Going way, way back, education was always at the top of the list. Some of the other things, maybe other than education, especially in the Foundation, were from his hometown of Pulaski, New York. He wanted to be able to give back to that community. He, being an only child who didn't have a lot of relatives, felt strongly about that hometown. A lot of the gifts still go to that northern New York town.

He had interests in equestrianism, and so to this day we'll all look for little projects that

have to do with horses, and many of those grants have to do with handicapped access to horses. There are programs out there that make use of equestrian corrals or staffing that help handicapped people take care of animals. Those are the main ones that I was told about initially.

I know the Foundation has continuously given to Lincoln Center in New York City. There has been this tradition of giving to the arts, and so we've qualified that as something that we give to in northern Nevada through the Trust. That branches out, and then maybe with that equestrian interest we go off into our environmental interests.

*You mentioned Allen Malcolm, Vernon Snow, and your father, who were the representatives for the Trust. Were there other people on the board at the time that you first became involved?*

David Snow, who is a nephew to Vernon Snow, and Jonathan Snow, who is Vernon's son, were both on the board. Jonathan had come either the year prior to me or a couple years prior to me, so he was fairly new as well. Joe Mitchell had been the counsel for both the Foundation and the Trust for quite a long time before I got there, and was an invaluable resource. He was someone who everybody looked to when there was a question about how we go about something. He was someone who could broker some of the personality conflicts that would come up. He would come up with a solution that was satisfactory to everybody.

Now, there are a lot of names that come up from the past that I never dealt with, but they will talk about them from time to time. They're more of the money manager types from the Bank of New York. The person who has been there from the Bank of New York



consistently since I came has been David Crimmins. There was another gentleman for the first three years, and I cannot place his name, but he moved on to Merrill Lynch.

I remember one of the greatest things that happened with the Foundation when I first came on. They had always had financial dealings with the Bank of New York, on both the Trust side and the Foundation side. In reading the will and reading the bylaws that had been set aside, they really felt like we didn't have to remain solely with this one money manager. Starting in 1997—it was quite exciting—they started interviewing different money managers, and now we have four different ones. That has enabled us to make sure that our assets are allocated in ways that protect them so that we can give grants from year to year, and are not in this volatile situation that some other foundations have found themselves in. It's been a great thing that John Ben Snow did not put that in his will. Sometimes other foundations' assets go up and down with frequency, and it makes it hard to really give back in the way that they want to.

*For the decision to put the money with multiple money managers, do you have a sense of how the idea initially came about?*

I think that over time they kept seeing this problem come up. When you ask, "What is our budget this year?" and one year (I'm just going to invent a number) it was \$200,000, and in one year it was \$400,000, you know that you need to address this.

I happened to come on in 1997 when they were interviewing these managers, and Allen Malcolm took the lead on that. I must say that we've tinkered with it quite a bit. We have fired or let go of a couple who were not performing. If we had just been with the Bank of New York, we couldn't summarily do that

as readily, but we can now. We can say, "You have one year to get your house in order or help us see why you're going in this direction." We have the diversity now to then look for another manager in the meantime and rotate that style of management. So that's been a great thing.

In the last four years we've had a new person come on after Bruce Malcolm left. We brought in Angus, and Angus is a money manager himself. That brought something nice to the table, and he has ladderized our investments so that we are ladderized all the way into 2014 and we have a real stability. We know what our budget can be, so we can really look at our investment policy. We have let our investors have a little latitude to try something a little different.

I know some other foundations have been more vulnerable. Say they were into mortgage-backed bonds. That wasn't the place to be. We never had a manager who was that heavily into it, but had we had that, having this ladderizing really would have helped us get through that period of time.

*In addition to Bank of New York, what other money managers are you using currently?*

Tocqueville. Drew Rankin has been our lead and he has probably about 40 percent of our assets right now. He looks for value in the market. He will buy companies that may be at a low point knowing that it is going to go up and they are doing some things to change their product. He is our number one right now. We have some with Merrill Lynch and we have some with American Funds.

*Has diversifying been effective?*

It has been very effective. It has been really a wonderful thing, because Jonathan Snow

and Ann Scanlon, as the program director for the Foundation, really know throughout the year approximately what their budget will be. When they go out to grantees they can say, “Apply for around \$20,000.” They might say “You could ask for a little bit more than what you’re thinking. Have you ever thought about this?” It aids in the strategic thinking and it also helps our grantees to know there is a stability there. When they apply for a grant, they will not be thinking, “Let’s cross our fingers.” They’ve been communicated with throughout the year that things are going well, they should take a look and do this slightly differently. We really want the grantees to feel like this is a two-way street.

Some other foundations make it so difficult. There are so many hoops to jump through, and it is this nebulous place or a black hole that they’ve put this grant application in, and then this little letter comes that reads yes or a no.

The grantees feel like they can call and say, “What can we do differently next time for a better result?” We feel like it’s a very professional place, but not a place where we hold all the money and we have all the answers. We like to learn from the other nonprofits, and with what they’re teaching us, we try to help other nonprofits. We also try to encourage collaboration and partnership.

*Can you tell me a little bit about when you first started, what you remember of those first meetings, and how long you felt like it took to get caught up and know as much as you know now about the Foundation?*

I remember my first meeting. They just kept coming around the table and saying, “You might want to read this. Here’s our investment policy.” It just became this stack of papers. You walk out thinking, “Do I need

all this? Is this all important? Can this all be Grade-A material or is this just their way of saying, ‘For your reference’?”

It took a good three years to get into the routine, get to the core of what was important and what might not be quite as important, and get into the rhythm of how the annual meeting works and how the committee structures work. Of course, as with anything in your professional life or your private life, [I learned] what the personalities were and who I could go to for questions and really feel like I was going to get an answer.

I think we’ve come to an understanding with each other about who has this set of skills or this set of talents. We really have a good broad base, even though we’re small, of who has these competencies. This organization, I think, can go on and on based on that. We’re good at analyzing where our weaknesses are and where our strengths are, so when an opening comes up, we say, “You really need some more of this,” and we try to go out and find that.

*When you first started, can you tell me a little bit about who the officers were and what role officers play in the whole organization?*

I believe that Vernon was the president right when I started. He came from an academic background and a grants background, and really had the Pulaski ties. He is the person who brought on Ann Scanlon, who now has got a lot of historical references in her head. She is a doctor with an academic background as well. She knows so many people in New York. She knows the outline of the counties and how they work together, and some of the political situations. So we all rely on her. She’s the person who has feet on the ground all the time. When you talk about the operating structure, she is the go-to person.

The president sets the direction for the next seven years. Their terms are seven years. We've evolved; the vice president, when I first came on, was the understudy in a way. Now I think the vice president is more on the finance side of things and provides the checks and balances to the president, in a way. Then there's the secretary—that's really as deep as the officers go.

The rest of us are directors. The directors can be no fewer than seven, I believe, in our structure. We could have more. We do have Marion Fish as our Syracuse connection, and she is now a director. She's been a welcome person that has come on because she is another person who can have her feet on the ground, can do site visits, and can suggest other partnerships out there because she's been with the Community Foundation of Syracuse.

That has been something that Jonathan wanted. When I say we're analytical about what we need, he identified that as something. To have just two people full-time in New York...it seemed like we needed more than that. Then again, we also knew that Allen Malcolm was our financial brain and that he was getting up in years, and so when Bruce left, we wanted a financial-investor type person.

We interviewed for two types of positions, and we got Marion and Angus at the same time. We just said, "We're going to have two so that we can answer two sides of this coin." That's been great because, unfortunately, Allen did pass away and we needed that backbone for those questions, so that we're both grants and finance oriented, and we can have a future.

*Can you tell me a little bit about the other people who are still present and what you see as their orientation?*

Val MacFie is Allen's daughter, and she really is a grants person. She comes from the nonprofit world. She has served with the YMCA for years. By doing so, she knew what collaboration and partnership were. She has pretty much been on the Grants Committee. She lives in New Jersey. She will go up a couple times a year to New York and do site visits along with Jonathan and Ann and now Marion.

She's a very caring person. When I'm on a site visit with her, I notice that she asks, "What kind of clients are you seeing? What are the trends that you're seeing?" Because she came from a YMCA background, she sees the needs for handicapped people. She'll ask about that: "Well, how do you serve those who come with physical disabilities or mental disabilities?" She has a lot of skills in that area.

Actually, I keep painting Angus in this box of being our financial person, but he has served on nonprofit boards, most recently in Maryland with a nature conservancy. I don't know the nonprofit's name. He has his own real passion for nonprofit work. He's a very inquisitive person, so he can look at the financial side of our applications and really see what they're doing, and ask questions of the program director who is applying that maybe one of us may not have thought of. It is great to have that.

My husband is on as my successor for the Trust side, so he helps me here in Reno and in Nevada. He has less to do with the Foundation, although we brought him back last year. In 2011, in Portland, we had a longer meeting and went one more day so that we could do some more planning, and did more of a retreat. We talked about what we're going to be doing going forward, and really realized that we never had a mission statement. My husband ended up helping craft that, and then we looked at

some other policies—discrimination and ethics policies—and different things that were not in place that the foundation center recommends that all foundations have. That was really important to do. It's worth doing. Every about five years we want to be doing that—take an extra day.

As a result of that meeting, we said, “We all need to get on the phone.” We tend to do a lot of committee work and some great things three to four of us at a time, but we are going to be having half-year meetings now, just over the phone, to touch base. It's really important to do that in December, because as a foundation you want to meet your one percent excise tax. If we're close, we can make an extra grant or just reassess where things are going on the financial side. If we need to do anything at that time of the year with any of our financial advisors, we can do it.

*Can you tell me what committees there are and what they accomplish?*

We have a Grants Committee and it accepts the grants starting in January. We get letters of inquiry January 1<sup>st</sup> and then as of April 1<sup>st</sup> full grant applications have to be in-house. We receive those, look at them, and do site visits in May together. Then in June we bring our recommendations to the full board.

There is a Finance Committee. They rebalance or look at the money managers four times a year. Like I said, they have worked out this laddering system so that we can move forward on our budgeting.

We have a Compensation Committee. Really, it only meets twice a year by phone and makes recommendations at the annual meeting. We're pretty conservative. The directors get just enough so it covers their travel expenses to bring a guest or their

spouse. The officers themselves get just enough so they feel like they got some recognition for the extra work that they do.

Whenever we do have an opening, there's a Nomination Committee. Usually it's the president and then two other members. We work out a system of nomination and an interview process, which, in the twenty-first century, we've done through Skype. That's been kind of nice. We can get a face and a name, and not just a résumé and a voice over the phone. That's something that's gone forward. Those are the committees.

*Has this changed over time?*

The Nomination Committee, I would say, is really new. Usually we would just bring in a family member. When I came on, there was no Nomination Committee. My brother resigned and my father said, “I would really like my daughter to be considered.” That's how that worked for many of us. Now we want to diversify and not just have family members. We want to have committee members. We're talking about maybe every other year having somebody who just comes on for Grants Committee, or for some kind of committee involvement, from the nonprofit world, so we get feedback and they feel like they're part of it, too. That is something that's new.

I think that because they used to just have Bank of New York as the money manager, there really wasn't a lot to do. Now it's really important that the Finance Committee meets throughout the year and does that rebalancing and tries to really have a sense of where we this particular investor sees things going. There is a lot more communication than there used to be.

*Can you tell me what position you held on the board and what that entails?*

I've been the secretary, and that entails taking the minutes at the meetings, taking the minutes maybe at the grant meeting, and then just sending out a notice of meeting. It's pretty straightforward. In fact, at one point they said, "Should we be paying you a little bit more?"

I said, "It's just taking the minutes." I didn't feel comfortable taking any money or compensation for that. It wasn't really, for me, that much of a burden of responsibility. In fact, I like taking the minutes because it helps me remember things that happened, the things that I say that I will do, or who will be responsible for something. It's all there in writing, but I've also typed it, so there's that extra stimulus. I kind of like doing it. Right now Val MacFie is the secretary.

We're not really into the titles. Jonathan has been the finance person on and off. When my dad died and when Allen died, we had to elect a president. My dad was supposed to be president starting in 2002, and so then we brought on David Snow to be the president. So he was for seven years and now Jonathan is the president. I think Jonathan is on his third year as president.

*Do secretaries have the same term length as president or vice president?*

Yes. Well, when I first came on, they had a position of secretary. I think Vernon was the president, Allen was the vice president, my dad was the secretary, and Jonathan was the assistant secretary. When I became an officer—I can't tell what year that was, but it was shortly after I started because Vernon died in 1998—there was rotation through, and I became assistant secretary. Actually, I was doing the minutes for forever. [laughs] When I became secretary, I said, "How is this different than being assistant secretary?"

They said, "Oh, well, we're not going to have the assistant secretary." [laughs]

When Val became the secretary, I had an unfortunate accident with my hand. I had said to her, "I'll take the minutes that first year, and then you can just format them and then that will be your training." We fixed it so we would be co-secretary just for that first year. Like I said, I had this unfortunate accident with my hand. She wasn't a typist. She's come a long way. She types now, but I couldn't do it. My hand was in traction in this little cast, and so I showed up at the meeting like this and I said, "You're just going to have to go for it." I sat next to her and we would try to recap, because things happen pretty quickly.

At meetings we'll get the three to four money managers on the phone, and they'll talk for an hour about what they're seeing. Being on the Foundation now for fifteen years, you see the cracks in it all. At first, I thought they were the gurus and I personally felt like they just knew everything. Now we've seen the financial ups and downs, so you know when they start saying, "Well, look at the paperwork. You can see that our ten-year track record is such-and-such," they're just trying to make up for the last two or three years of bad financial outcomes. Everybody's in that same boat, but they'll try to gloss over it.

So, taking notes for an hour, you have to cull it down into about two or three paragraphs with the salient points of what they said. We tried to just talk to each other and say, "What do we want to say? What are they up to?" We try to be brief but talk about the important parts. So I put down minute-taking initially, but it is very important, especially when you look back seven years ago to what were we talking about and how were we trying to learn from that historical point of view.



*Can you tell me a little bit about the difference between the Trust and the Foundation?*

The Foundation was set up in about 1949 by John Ben Snow. It's a much smaller corpus. It is about \$7 million right now, which is great. The Trust was the remainder of all his assets. Upon his death in 1974, the Trust was created and it had no geographical boundaries, while the Foundation money must stay in New York. In fact, there must be a Foundation person living within fifty miles of downtown Syracuse, whereas with the Trust, there are no bounds other than grants need to be made in the United States.

As a trustee, I have my grants in the West. Basically anything west of the Mississippi I might get a grant for. It's harder for me to visit that far, and the majority of the money that we do make grants with will come here to northern Nevada.

The Foundation makes several grants that are yearly, one of them being scholarships to high school students at Pulaski High School. Then Ann Scanlon tracks all those students, where they go, and how that works out, so she has a real feel for how that investment has played out over the years.

The Foundation tends to fund things at the Maxwell School on the campus of Syracuse University. Jonathan has worked really hard to try to get some of those grants that are made year after year endowed and self-funding now, so that new groups can come on and get consideration. It was really, for a long time, just bound by certain traditions: "We always do this. This is what John Ben Snow needed to have happen." By endowing grants it has helped perpetuate that interest of his, while still being able to move forward into new things that were not anticipated those many years ago.

For the Trust, a difference is that we still are with the Bank of New York for our one

and only manager. It could be that the three trustees go out and change that, but we haven't had the appetite to do that yet. Our grants are fluctuating a little more and our corpus has remained stagnant, so we're not giving away as many grants as we would like to.

*Are there other regions that the Trust gives to you?*

It depends on where that third trustee's living, because Jonathan Snow lives right there in New York. When we come in in May for a grant meeting, he'll have a stack that come to the Trust and a stack that go to the Foundation, and he'll say, "Well, this one we'll just put into the Trust stack."

That third trustee had been Allen Malcolm for years and years. When I first came, he lived in New Jersey, so a lot of his grants were either going to Manhattan or New Jersey. Then he had a part-time home in Florida, so he would give grants down there because he was spending part of the year down there. He would say, "I'm a part of this Trust. Would you like to apply?" It was a nice way to make other nonprofit groups be the recipients. Then he moved down to Maryland, and so then we entertained grants from that region of the country—the middle Atlantic region. He lived there for six to eight years, and then he passed away.

Now Val is the new trustee. She lives in New Jersey, so we're seeing a lot more New Jersey grants come through. It's nice, really, when you think about it. I would like to do the same myself—widen that geographic interest in a way. I am noticing, personally, that I'm getting a lot more grant applications from southern Nevada. We've given grants to them more and more, which was not my dad's tradition.



Going back to the beginning, though, Chick Stout never gave any grants. He would say, “Just you two give grants,” meaning Vernon Snow and Allen Malcolm. When my dad came on as a trustee, they said, “Do you want to give grants?”

He said, “Yes, of course I do.” So that’s been to the betterment of a lot of people in northern Nevada that he said, “Yes, I would like to.”

When he passed away in 2002, I was able to take that and seek out some other groups. We try to be proactive instead of just waiting for the letters of inquiry to come in, and just talk to people throughout the year. There are always new groups coming out that you never heard of or perhaps one that you haven’t visited in a long time. I think, “I know they’re doing some good work over there; let’s ask them why haven’t they applied in a long time.”

I have been able to do that, and, personally, it just makes you feel really good to know that you’re helping an arts group or an environmental group. You know that something has happened because you give a grant. Many times we cannot cover the whole cost of what they’re saying their project is worth, but we feel like that John Ben Snow name is out there. If we say we’ll fund 40 percent of that project, maybe the Redfield Foundation, the Hawkins Foundation, or some other local foundations will come on. It attracts money so that these groups can continue to do the good work that they want to do, and we can be the seed dollars out there.

I know for a fact that by saying that we would support the new medical school building that they opened last year it was very helpful in getting the legislature on board. They were in and then they were out, and then when some of that seed money came in, it helped.

Now, we were by no means the large majority. I know for a fact that the majority of the money came from the gentleman from Circus Circus who just passed away this year. He put in the lion’s share of the money, but it meant something that there was this commitment on our part, because we said that we would give a grant of \$50,000 every year for three years. We are now doing the same thing with the journalism school, and the Reynolds Foundation came in because of that. They were able to show that these certain foundations locally are supporting it, and the Reynolds Foundation helped fund the rest of it.

We make a difference from the standpoint of higher education or educational projects in school districts. A lot of our nonprofits are now just trying to provide things that traditional education cannot do anymore. I like to fund those kinds of things, whether it’s a singing program, arts program, or physical education and nutrition program—the things that have been cut along the way. Another nonprofit can come in and help bring these projects back to life.

*You mentioned that John Ben Snow valued education and he had an equestrian interest, and that you’ve given grants in that area. When you came onto the board in 1997, were there other types of things that you would fund?*

I’m not sure specifically in 1997. We had an emphasis in education, and it actually has changed. We do a pie chart of where the grants are going. When I came on, it would show that about 65 percent went to education. If you looked at the pie chart now in 2011, it would be a little less, maybe closer to 50 percent.

We’re doing a lot more in social grants. It might be to help a homeless program, it might be to do more work with the handicapped, or

it might be to address the needs of a specific population. “Community initiatives” is what we call it. That has been a change along the way, but I don’t think we stray very far from that core, because in a lot of ways you could say that that has an education bent to it.

Another thing that I notice is some years I’ll get things that all pertain to libraries, and then another year it’ll be the year of partnering with children. I don’t know if it’s something in the water or just something that nonprofits have seen a need for come up, so they say, “Let’s do a program like this.” You’ll see things that have an ebb and flow to them.

For a while it seemed like we were doing a lot of science and technology. If you look at society in general, it was because we were having this almost earth-shattering need to keep up with servers and the tech side of things. This building that we’re sitting in right now, the Mathewson-IGT Center [at the University of Nevada, Reno], is very high-tech. We’re seeing a shift away from books, and more of a need for technology. If we want our colleges and universities to keep up with that, they’re going to need funding to make that happen. Now it seems like we’re seeing a little less of that, and because of the market dive, we’re doing more of those community initiatives—just the core needs.

Starting in 2008 we said, “We must even do a little less of arts grant-making for right now. We’ll come back, but we really just need to make sure that people are getting their meat and potatoes.” For instance, [we would fund] a van for the homeless to get back and forth to their day center, or a grant to buy bus passes for a charity so that the homeless can go look for jobs and then come back to their day center. Those are the kind of grants that we’re making right now. Hopefully, we’ll be doing some of the other kinds of

grants in environmental areas or historical preservation.

*Is there anything that helps to determine how much you’ll give to individual grantees?*

Well, our brochure says grants average about \$10,000, and I think that that is really true of the Foundation. We’re dealing with a budget every year of about \$250,000. If you have forty agencies apply, you’re going to fund about twenty-five of them and they’re going to be about \$10,000 each.

What happens with our Trust is that usually we’re at about a million dollars, but then we chop it into thirds, so that Jonathan Snow, Valerie MacFie, and I each give about \$333,000. When I first started, I was getting every development person at the university [University of Nevada, Reno] calling me.

I finally said to John Carothers [of the University of Nevada, Reno Foundation], “This is not a very good impact. I would rather you tell me what your priorities are, and instead of doing a \$20,000, \$30,000 and \$5,000 grant, let’s make a \$50,000 or a \$75,000 commitment depending on the year and how things are going. I’d rather just do it that way.”

So, consequently, we’ve done a lot with the journalism school, and we’ve done a fair amount with the medical school. I will say, “I want to now take a break from them. Now tell me, what are your other priorities?”

Oral History has been a little bit different, because when I first started in 1997 and then as a trustee in 2002, they were not a department. Now they more or less fall into the History Department. I’ve made grants outside of my commitment to those bigger grants. I’ve done that at the Planetarium and I’ve done that with a couple of other departments on campus. So I can break my own rule, but it has been much better than hearing from every single

development person on the campus. That's one of the things that I feel like has been more impactful.

*Do you tend to give smaller grants or do you find that yours are usually a little bit bigger?*

For whatever reason, it seems like I'll have two or three big grants and then the rest tend to be in the \$10,000 range. I'll get a small grant, but it's just as impactful if they say, "We want to buy three new instruments for our chamber orchestra." It means a great deal for a chamber orchestra. It's big to them. It's small maybe to me if it's a \$4,000 grant, but it means something.

One of the other grants that we've made pretty consistently is to have students go to concerts. That's a small grant, but it impacts a lot of students who can go for free. They just show their student I.D. So I like that, too.

I tend not to do grants that are event-oriented. People may say, "We are going to have this festival in July." I think there are a lot of corporate entities, banks, or somebody who wants to have their name in lights and who will sponsor the festival, the tree-lighting, or the band going to the inauguration. I think there are entities out there that can be tapped into. When I make a grant, I want it to be something that's going to last for a long time and make a residual result. So those are just my rules; they're not the Foundation or the Trust rules.

John Ben Snow, we've said this a lot on our board, didn't want his name in lights. An organization might say, "We want to put your name on the donor wall."

We say, "Well, if you want to. If you think that that will make a difference for somebody else to give." Someone might see it and say "Well, that foundation's on the wall, so we should give, too."

That is great, but we're just as happy giving to the elevator or the bathroom to make it ADA [Americans with Disabilities Act]-compatible. We don't really need to have our name on it. Over time, organizations want to parcel things out, and maybe that's because other foundations need that on their list of what they've accomplished. They might have a study room here at the Knowledge Center. That's fine if you want to put our name on one of those, but that's not what we're here for. We're here to just build your Knowledge Center.

*Do you find that your general philosophy on how you handle grants here in Nevada and in the West differs at all from Jonathan or Allen, before he passed away, and now Valerie?*

I think Allen was the kind of person who really was a handshake kind of a guy, I feel like I have that kind of relationship with some of my grantees. Jonathan is very professional, so he's very rules-oriented. If something comes in late, he's just a little bit more rigid in that way. Not to say he hasn't built relationships. He has a breadth of knowledge of central New York politics and knows whose personalities are what. When it is just one of you doing it, you are going to have your own style.

Val, like I said, really has a caring point of view. She will tell a very long story about every single grant that she gives. We have a pre-meeting before the meeting, where we will talk on the phone for about four hours just to run through grants. She'll have a very long story about how a child was playing with the clay and what she witnessed when she went for her grant visit. I tend to try to boil it down. I have my specific reasons. They will often ask, "Well, what did you see when you went there?" or, "Why did you want to give this particular amount?"

There is a lot of trust that goes along with the whole thing. I just know that they have the passion for this, as I do, and so when they say, "This is a good organization. I can tell. They've worked with umpteen other organizations," I know they've done the due diligence.

That's the nice thing about being a smaller foundation. We know each other that well. We can be honest with each other and ask those questions. I'm sure we all have a different approach, but I think the end result is that we would all give to that charity but maybe for different reasons.

*Do you find that beyond individual philosophy, in terms of the actual organizations being funded there are any differences in which organizations are funded here in the West versus the Syracuse area versus New Jersey?*

I think I give to a lot more environmental organizations, and I think that's because maybe more environmental organizations exist out here. We have a penchant for where we live in these wide open spaces. Let's save it. Let's make sure that the Land Conservancy can come in or another group can come in and clean the river, keep the Truckee Meadows beautiful, or do something that will have that kind of impact.

They will have more historical preservation. Why? Because there are a lot of old buildings out there. That is something. They have Cooperstown, which is a longstanding grant in the State of New York, and they train people to be museum curators. We don't have anything like that out here. So, yes, they're going to have a different mix. Out here, we give to the humanities. For whatever reason, maybe Jonathan and Val are never approached because the humanities are going after bigger, fatter foundations and trusts out there, but they never give to humanities. We've been

a clear supporter of humanities, though. The humanities match up with everything that John Ben Snow did or said that he was interested in when it comes to education, writing, and things to do with books. So why wouldn't we? Well, it's probably because they just haven't been approached and they don't have an interest in asking them to, because they see that they are getting funding from other sources.

That's an interesting question. I'm trying to think of some other differences. We all stay clear of religious organizations. We have said that you can't be a purely religious organization. We have given to groups that do community initiatives, but they can't be just Christian. They have to serve all.

*Have you seen a broader shift over time in what people are asking for?*

One thing that we're seeing is more organizations trying to help people get into higher education, where in the past, maybe it used to be easier to apply or maybe there were more government grants. Now we have to teach kids how to apply, so that's a trend.

Because of the economic downturn, a lot of foundations are asking organizations, "What are your core results?" We're getting more into numbers than we were. We were giving grants because it felt good. We knew empirically that this was going to be good, but you couldn't measure it, like teaching kids values through singing. There is a group that would come to the schools and teach the children songs, and what a great thing that was. But how do you measure that?

We're still going to have those feel-good grants because we know that there are going to be some results out there that are not as measurable. It seems like the nonprofit groups are getting savvier in saying, "We can measure

the results. If you give to our group, we can measure it." I don't know if that's going to continue or if that's just the *du jour* and they feel like they're speaking our language. Maybe they're speaking out of other foundations' languages more than ours, if that makes sense.

It's the quantitative versus the qualitative argument. We have questions on our grant application, which is very simple, by the way. I've seen other foundations who have so many organizations applying that they have to have some way of saying, "You didn't meet this criteria." We ask, "How many people will this serve?" I never really focus on that question, and maybe other trustees would.

I did have one group one year who said, "We want this \$50,000 grant, and it's going to help benefit twelve people." It was their summertime activity, and they were going to go out into the desert and do this program.

I said, "No, that's not going to work."

Rarely am I really fixated on numbers, though. I think that's for the ballpark kind of corporate bank structure. "How many people are going to come through the door? Fifty-thousand? Wow. I want to support that." I'm not really as into that. If it's going to be ninety journalism students for the next thirty years, I'm into that. I want them to have the infrastructure there where they're going to learn, because journalism was one of the things that John Ben Snow was interested in.

*Once you actually receive applications, how do you go through the decision-making process? When are the monies then distributed to people?*

Some of that has changed over time and some of it hasn't. When I first came, it was really innovative that we said, "You have to have your letter of inquiry to us January 1<sup>st</sup>, and you have to have your grant application done by April 1<sup>st</sup>." They entertain so few, if

you were on one side or the other of those dates, it wasn't as important. Now I really stick to those dates because I've said that throughout the year. It's not fair to everybody who has taken the time and the effort to make sure that they get things in on time to then say, "Well, you're okay. You come on in."

So January 1<sup>st</sup> they have to have a letter of inquiry. Then they get a letter back with the application or a letter saying, "You really don't fit our criteria," by about the 15<sup>th</sup> or the 20<sup>th</sup> of January. Then they have until April 1<sup>st</sup> to get their grant application in.

One of the things we do now is instead of typing up all their responses to the questions on a piece of paper, the applicants get a Word document, which they email to us. They can download them from our websites. We just get a better product. They can call any one of us if they have questions, like, "What do you mean when you ask this kind of question?" For instance, we now ask for their email and their website addresses, which we just never even had to consider in 1997.

Those grant applications all come in April 1<sup>st</sup>, and then we have about six to eight weeks before we meet with our fellow trustees or, in the Foundation's case, the Grant Committee. We get an amount from the financial advisor, who says, "This is how much you have, pretty much, to deal with this year." There is a whole discussion about that—how did we arrive at that number, and do we want to back out some? We always have some holdover from years previous that we could use, so we decide if we want to table that for another year.

Then it's a matter of going out and making site visits or talking to people over the phone. I tend to read over the grants. If they're brand new, I want to make a site visit. I've never seen these people. What are they about? I'm fascinated by it. If it's a grant application from a group I've seen before, it may be time to do



another site visit. Is this a new program that they want to start, or do they want to tweak something they've been doing? Perhaps it's pretty straightforward. I don't need to see the servers that they propose. They may want to have stage lights put into the theater, but I don't really need to see all that, or the elevator that needs a new switch system. It just depends really on what the program is. If it's something that's visible programmatically, I love to go do that.

Based on that, you can tell if it's padding. I ask, "Really, why do you need that much? Let's look at your budget." I was frustrated when I first started doing it in 2002, because I felt like no one even knew how to put together a budget. I would ask, "What is all this money that you're asking for going to?" I really like to see it. "You say your project is \$100,000 and you're asking us for \$25,000. What do you want our \$25,000 to go towards? Are we the bricks and mortar part? Are you trying to have us pay for the salaries here?" We really need to know that, instead of just this proposal saying, "It's going to cost \$100,000. Get on the train." I think executive directors have become more and more sophisticated. Some nonprofits had never even asked those kinds of questions before. It's been a learning curve for everybody.

We come up with a list of those we want to fund, and then we have who we'd like to fund, and then who we absolutely do not. I run with those A, Bs, and Cs, talk to Jonathan and Valerie, and then have the full list ready to go for when we meet in June.

Then based on the vote, we know who we're going to fund for the next year. I go by whether they are a summer program, or whether they need this money in order to get started for the fall. Is this for the Philharmonic, and they need to purchase new violins for the kids who are going to

be taking the lessons, or can they wait until October or November?

I tend to do my biggest grant checks in December. It's just the way I prefer to do it. For my small checks, I may have ten of them go out in August and ten in September, and then two in December. It just depends. We try to make it so it's even, so that we're not hitting our investor over and over and over. [We don't want them to say] "Wow. This is a big month, and I'm going to have to sell some things in order to pay for these grants." So if I have \$75,000 coming out in December, I'm still probably going to have \$75,000 coming out between August and September. He can plan on it, and then we're doing it all over again in January.

*You mentioned it was professional when you started, but it's become even more professional. Can you tell me a little bit more about that and the changes you've seen that have made it more professional?*

Well, one of the things that we do now is grantees have to have the summation of what happened with their grant due March 1<sup>st</sup> or as soon as they've spent all the money. They may only have spent a part of their grant by March 1<sup>st</sup>, but we expect to see that. I don't think that that was necessarily a hard and fast thing. You would hear people come into the meeting saying, "Yes, I've heard from about half of my grantees. I still have to chase down a few of mine." That just no longer happens. I've heard from all of them. Maybe they're still in transition, their building is being built, their new collection is still being archived, whatever it is is still in progress. Now we are trying to go back five years ago and ask, "How has our grant impacted your programming? Please give us just a two-page summary of how John Ben Snow funds have affected



your organization.” I think that adds to the professionalism there.

Another thing is just all of us feeling like we’re hands-on. We don’t say, “He or she does the investments. I don’t keep track of that.” We’re all responsible now. We all professionally try to keep up with what’s happening in markets because we want to be here for many years to come.

*Does this change in procedures and solidifying these rules have anything to do with the changeover of people on the Trust and the Foundation over the last ten years? It seems like there’s been a lot of turnover over the last ten years.*

I think so. I think David Snow, being a lawyer, would expect a certain amount of procedural or analytics going into things. Jonathan’s from a software background, so he’s going to have that special bent. I have a marketing/nonprofit background, so I’m going to have that skew and expectation, and wanting to meet needs in that way.

It’s also a new generation. Whereas our fathers knew the reputation of a nonprofit organization and built that trust of those organizations, we’re doing this as a part-time thing. We’re not out there, maybe, trying to be friends with our grantees. We have to be more professional. It’s not your fellow Rotarian who you’re going to lunch with every week and you know them well enough that you can say, “When I get that grant, I know he’s going to steward it all the way through.” I don’t have that kind of personal relationship because I don’t have all that time. I’m not retired. So there is this other layer of expectation with our grantees.

*What do you see for the Foundation and the Trust in the future?*

Well, at our last retreat we said we want to entertain more new organizations. It doesn’t mean that they’re automatically going to get a grant, but we need to be looking for other organizations. We need to be encouraging all organizations to teach their clients that they can’t always be looking to their nonprofit for help. There has to be that teaching aspect, so then they can go on and not need that nonprofit service any longer. Teach a man to fish and he will no longer need the fish to be brought to him. That’s one thing.

The Trust will eventually diversify the investment structure. I don’t know when, but I think that is coming. There may come the day when the Foundation and the Trust merge and it’s all one organization. The question then will be, are we restricted to New York or is the New York fund no longer going to be restricted to New York? We don’t know. We haven’t really crossed those bridges, but I think that will happen at some point. There is an end date. When Jonathan’s generation passes away, we will have to do something along those lines, like merge. It’s something that we need to address.

*Is there anything I haven’t asked you about that you feel is important to include?*

For me, I just want to say what a magnificent thing it is that I get to help other organizations do good work. People say to me, “How did you get to do that?” I don’t know. I mean, I just feel like I’m lucky enough to be born in a time and a place where that was passed along to me, and I feel that it’s a responsibility that I do the right thing by that. I’m just lucky that now I get to see that seed money pay forward. I’ve met a lot of great people along the way because of it, on our board and elsewhere, and I’ve seen a lot of places I would have never seen. Then here in Nevada, I have just met a lot of great people.

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## PHOTOGRAPHS

*All photographs courtesy of the The John Ben Snow Foundation, Inc. Archives,  
unless otherwise noted.*



John Ben Snow



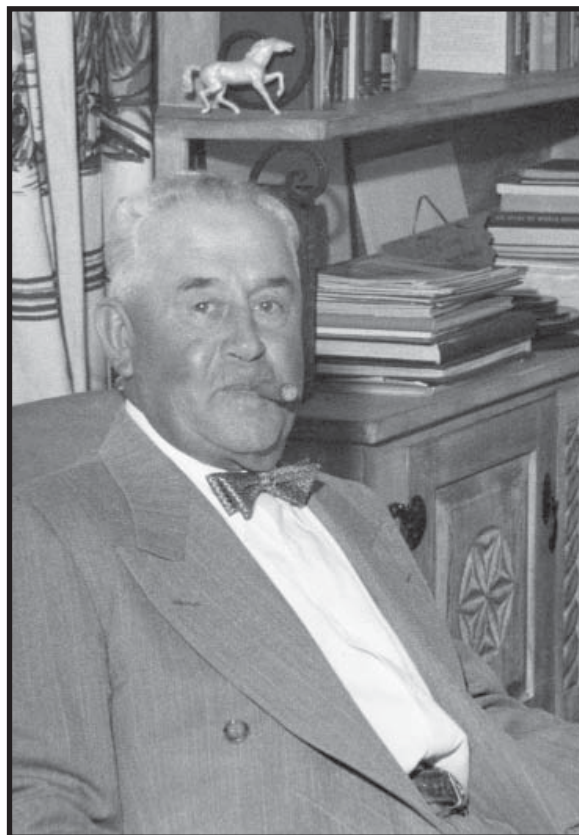
John Ben Snow



John Ben Snow



John Ben Snow, Sparkling Bay Studio,  
Colorado Springs



John Ben Snow in Speidel Newspaper  
Office, Colorado Springs, 1963





Salmon River News, June 29, 1982. Article about John Ben Snow.





John Ben Snow Foundation Board, 1988

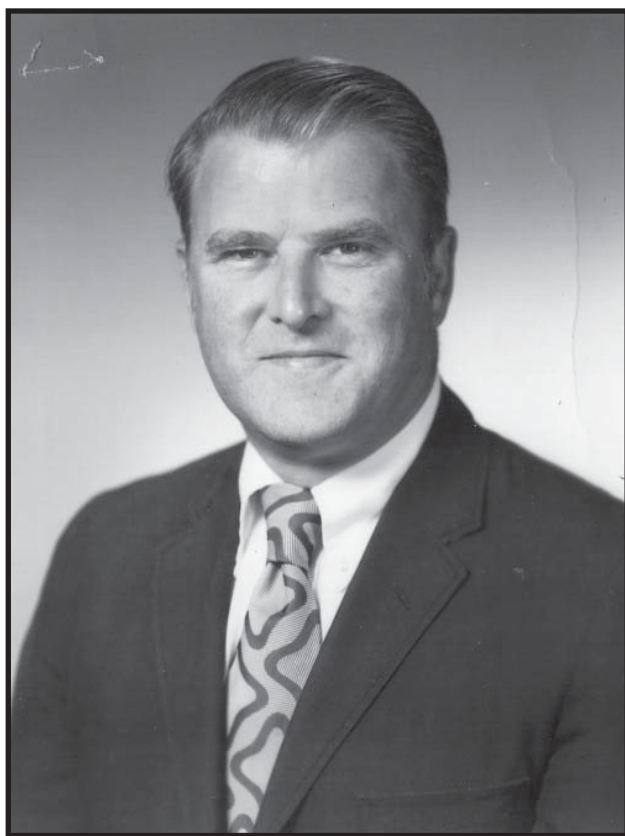


John Ben Snow Foundation Board, 1998





Harry S. Bunker



Allen R. Malcolm



Talbot M. Malcolm



Rollan D. Melton

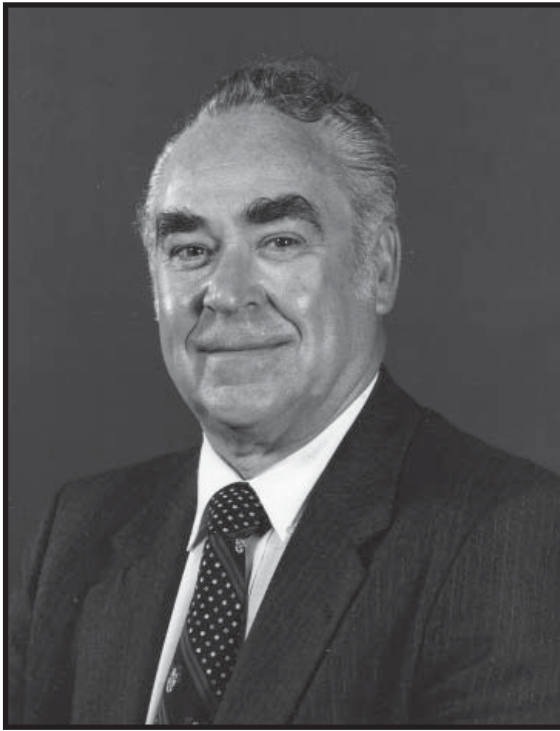


Charles G. Murray



Jonathan L. Snow

*Photograph courtesy of Jonathan L. Snow*



Vernon F. Snow



Charles H. "Chick" Stout